

# IPX1031 Strength, Security & Expertise

When selecting a Qualified Intermediary, many factors should be taken into account. The two most critical factors for evaluation are:

**1** SAFETY & SECURITY OF EXCHANGE FUNDS

**2** COMPETENCY OF STAFF

## ▶ SECURITY CONTROLS & ASSURANCES

Safety and security of exchange funds is a matter of paramount importance. IPX1031 routinely provides customers with the following superior safety and security controls for exchange funds:

- \$100 Million Fidelity Bond.
- \$50 Million Written Performance Guaranty.
- \$30 Million in Errors & Omissions Insurance.
- IPX1031 is a wholly owned subsidiary of Fidelity National Financial (NYSE:FNF).
  - » Largest provider of title insurance services in the world.
  - » The highest-ranking Fortune 500 title provider.
- As part of a large publicly traded corporation, we are subject to audits, controls and a level of financial transparency about the entire organization that is not required of privately held businesses.
- Exchange funds are held in segregated accounts for the benefit of the named Exchanger using the Exchanger's taxpayer identification number.
- Regular reconciliation of exchange account balances.
- Disbursement of exchange funds requires written authorization of the Exchanger.
- All disbursements require dual authorization and are controlled by our Banking Division Sales and administrative staff have no authority or ability to transfer funds.

## ▶ EXPERTISE

When it comes to expertise, IPX1031 is like no other. With nationwide offices and a formidable team of experienced attorneys, sales specialists and coordinators, IPX1031 is here to offer you unparalleled service strengthened with core expertise to get your exchange completed. Period.

When you choose IPX1031 as your Qualified Intermediary, you can be confident that we will use our best efforts to facilitate your exchange in an expert manner and that your funds will be safe, secure, and available when needed.

Please contact us for further information or to discuss your specific 1031 situation.

**Russell Marsan, Senior Vice President**

**Cara Ryan, Vice President**

Russell 530.755.8355 russell.marsan@ipx1031.com

Cara 916.472.9732 cara.ryan@ipx1031.com

ipx1031.com/TeamMarsan

