



Do You Use Tax-Deferral Opportunities Under A 1031 Exchange?

Imagine a qualified intermediary that:

- Instantly notifies you by e-mail regarding important deadlines on your exchange.
- Instantly notifies you by e-mail when key documents are ready for your review.
- Allows you and others involved to fax or e-mail documents into a secure Website, providing instant notification and access to documents prepared and posted to the site.
- Gives you access to this information 24/7 (password protected, of course).
- Gives you deposit rates equal to or better than prevailing Money Market rates on equity held for you.
- Gives you the option to deposit up to \$2.5MM in a fully secure account at near prevailing money market rates.
- Publishes a transparent fee structure - no hidden costs or “add-on” costs.
- Is experienced in a variety of asset classes in addition to real-estate - including oil & gas, aircraft, and almost any like-kind exchange.
- Services transactions anywhere in the United States.

ALLIANT NATIONAL EXCHANGE SERVICES (ANeX)
A Qualified Intermediary for 1031 Exchanges.

888.707.1031 | www.alliantnationalexchange.com

REAL ESTATE | AIRCRAFT | OIL & GAS | OTHER ASSETS



How Do We Care For You And Your Assets Better?

1 ONLINE TRANSACTION MANAGEMENT FOR 1031'S

We have created an online transaction management system we call **SecureXchange**, for the 1031 Exchange process. *This system operates with any title company, anywhere – regardless of which underwriter is being used for your transaction.*

The system makes it easy for clients and title agencies to work with us regardless of where they happen to be at a given moment.

- The system notifies all parties to the transaction of important deadlines in advance and of completed documents or process steps – automatically via e-mail!
- It is accessible, on a password-protected basis, 24/7 online – so if you are notified on your Blackberry that a document is ready for your review – simply log in at your convenience to approve or comment on changes.

We are unaware of any other qualified intermediary with a system that supports the needs of your schedule!

2 UNIQUE DEPOSIT OPTIONS

We have structured a set of two unique deposit options for Exchange clients – both with great yields (based on rates of 11/16/06)!

- The *first option* is a money market account that yields more as the deposit amount gets larger. Today that account would yield 4.48% for a deposit of more than \$100,000 – and can climb to a yield of about 5% as the deposit exceeds \$1,000,000. These are very competitive rates for liquid deposits.
- The *second option* is a US Treasury backed account – to provide safety – this account pays about 4.36% for deposits over \$100,000 – and is fully invested in a very short-term maturity US Treasury Bond fund – not insured, but as secure as the US Government!

We are working on a fully FDIC insured option up to \$2,500,000. We should have it available by the end of February.

As far as we know both of these options are unique offerings for Qualified Intermediaries.

3 TRANSPARENT FEES - NO HIDDEN COSTS

Our deposit options support our fee structure and philosophy – transparent and no hidden costs. As you know, exchange companies commonly have a host of “add-on” fees. The most common hidden cost is when Qualified Intermediaries’ (QI) charge a low transaction fee, then “skim” the interest on your deposit. They can do this in a number of ways, including:

- The QI can delay the transfer of client funds from their operating account into a client’s deposit account, thereby earning interest in their corporate account. These delays can be extended in a variety of ways – like extra time in getting paperwork to, and returned from, clients to establish their own interest bearing account, thus allowing the QI to retain the interest on your deposit for weeks at a time.
- The QI can take a “spread” on interest paid on the account from the bank (directly or indirectly) – in effect paying a low yield on your deposit and keeping any difference. *Many QI’s charge a low fixed fee, but find a way to benefit from the client’s deposit.* We do not skim interest in any way.
- Our fee structure may look higher than some companies, but when you do the math – the client earns interest far in excess of the difference in fees.

Here is a simple example:

If you have \$1,000,000 of equity that is held by the exchange company, and our fee for the transaction is \$1,250 vs. a competitor priced at \$750, our fees are \$500 more up front – but we have no “add-on” fees. Our competitor will pay you 2% on your deposit, a common rate right now, but our account pays you 4.9%. You earn 2.9% more interest on your money for the time it is held by the QI. You will earn about \$2,415 *more* in interest per \$1,000,000 deposited, *each month* your funds are held in the exchange – so what looks like a more expensive fee upfront is covered. In this example, the difference in fees is covered by increased interest income in the first 6 days the money is deposited - *You would earn almost \$14,000 extra over a 180-day Exchange period with Alliant National Exchange Services!*

4 EXCHANGE SERVICES FOR A VARIETY OF ASSETS

Real estate comprises most exchanges, yet a 1031 provides the same tax-deferred opportunity for many other types of assets including aircraft, oil & gas, livestock, industrial equipment and more. Our staff has experience in a variety of asset classes – call us for more information!



5 LEADERSHIP

Jeff Rattikin, Esq. leads ANeX as President. Jeff has earned an outstanding reputation specializing in 1031's since the early 1990's. He and his experienced staff operate ANeX out of Fort Worth, Texas. They have handled hundreds of Exchanges involving real estate, oil & gas, aircraft and other assets worth hundreds of millions of dollars. Board-certified in Residential Real Estate Law by the Texas Board of Legal Specialization, Jeff is an AV-rated attorney, and a frequent presenter at real estate industry conferences, workshops and meetings on subjects related to the intricacies of 1031 Exchanges.

6 1031 EDUCATION FOR YOU, YOUR CLIENTS AND YOUR STAFF

We are available to conduct seminars on the nuances of the 1031 Exchange Process – and schedule them for you or your clients. Seminars cover a variety of topics concerning 1031's, two examples are.

1. *A Broad Based Understanding of Sec. 1031 Exchanges for Professionals.*

An overview of all types of exchanges - forward exchanges, reverse exchanges, construction exchanges and related issues. Oriented towards Lawyers, R/E Agents, Tax Professionals, CPA's, Investors, Financial Consultants, Estate Planning Professionals, and Bankers. (2 Hours)

2. *Developing Issues in Exchanges, Reverse Exchanges, and Construction Exchanges.*

This is for those familiar with forward 1031 Exchanges, and want updates on breaking issues. It is oriented towards Lawyers, R/E Agents, Tax Professionals, CPA's, Investors, Financial Consultants, Estate Planning Professionals, and Bankers. (1 Hour)

These presentations can be modified and/or used in approved continuing education programs. Please feel free to call Jeff to discuss presentation options and schedule an event for your clients or staff.

PLEASE GIVE US A TRY ON YOUR NEXT EXCHANGE!

JEFF RATTIKIN, President

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