



The Voice of the 1031 Industry

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Nano Banc has an innovative, patented technology platform and a team of industry experts that are dedicated to serving the Title, Escrow, and 1031 Exchange industries. We offer the highest levels of security, competitive rate economics, and personalized service in banking for your escrow, trust, and 1031 custodial accounts. We understand your critical timelines, cybersecurity needs for fraud prevention and the necessity of knowing your individual operational needs. Whether you're an enterprise, national Fortune 500 company, or a one location branch, we have all your bases covered to ensure a seamless, secure and trusted banking experience.

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Named one of America's best banks by Forbes and top local bank in San Diego, Axos Bank® has reinvented the banking model, growing to \$10 billion in assets in just 19 years. We remain focused on our award-winning customer service, maintaining and cultivating lasting relationships and creating a suite of innovative digital tools to help your business evolve through custom banking and lending solutions. Axos Bank is FDIC-insured and our holding company, Axos Financial, is publicly traded on the New York Stock Exchange under the symbol "AX".

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### **SYNDICATED EQUITIES**

Syndicated Equities has successfully worked with thousands of investors completing 1031 exchanges since its inception in 1986. Syndicated Equities provides 1031 Exchange investors with replacement property opportunities through either its Net Lease Brokerage division, or as a fractional interest in a larger institutional quality property (Tenancy-in-Common, Delaware Statutory Trust, or land trust). We seek to understand each investor's personal investment preferences and goals, including the replacement of leverage, before recommending a suitable replacement property option. Investments are structured to provide attractive current returns and preserve capital through multiple market cycles. Our investments include stabilized retail, office, parking, federal government, hotel, and credit tenant net leased properties. The principals of Syndicated Equities invest alongside our clients in each property, reflecting our careful due diligence, alignment of interests, and personal commitment to the success of our investments. Syndicated 1031 exchanges are offered via Metropolitan Capital Investment Banc, Inc., a member of FINRA and SIPC.

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Contact: Michele Fitzpatrick, [mfitzpatrick@nbt.com](mailto:mfitzpatrick@nbt.com)



### **Northern Bank**

Northern Bank is a Massachusetts-based chartered full-service bank. Founded in 1960, the company, headquartered in Woburn, Massachusetts, takes an entrepreneurial, commonsense approach to providing a complete line of banking solutions. Northern Bank has assets of \$2 billion and is a Member of the FDIC, an Equal Housing Lender, and consistently ranked among the best performing community banks in New England. The cash management group at Northern Bank provides dedicated 1031 account services to qualified intermediaries. Our non-commingled escrow deposit accounts offer highly competitive rates and attractive features including customizable split interest, QEA and wire call back security. For more information on online banking services please visit [www.nbtc.com](http://www.nbtc.com) or follow the Northern Bank on Facebook (/NorthernBankMA/), Twitter (@northernbankma), and LinkedIn (company/northern-bank-ma/).

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Contact: Monica Ng, [monicang@umpquabank.com](mailto:monicang@umpquabank.com)



Umpqua Bank, headquartered in Roseburg, Oregon, is a subsidiary of Umpqua Holdings Corporation, and has over 350 locations across Idaho, Washington, Oregon, California and Northern Nevada. Acknowledged for its innovative customer experience and banking strategy by national publications including The Wall Street Journal, The New York Times, BusinessWeek, Fast Company and CNBC, the company has been recognized for eight years in a row on FORTUNE magazine's list of the country's "100 Best Companies to Work For," and was recently named by The Portland Business Journal as the Most Admired Financial Services Company in Oregon for the eleventh consecutive year. With over \$25 billion in assets and strong asset quality and capital position, Umpqua Bank is well positioned to help businesses succeed. Umpqua Bank's Specialty Deposits Group offers title, escrow and 1031 exchange accommodator companies the expertise, experience and knowledge to help meet your unique banking needs. Our bankers take a proactive and consultative approach with you to streamline and enhance operations while protecting customers from a variety of transactional risks.

## TOTE BAG

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[www.customersbank.com](http://www.customersbank.com)

Contact: Peter Douros [pdouros@cbpcb.com](mailto:pdouros@cbpcb.com)



Customers Bank is a full service financial institution based out of Wyomissing, PA. It recently established its New York City Division, CB Private & Commercial Banking, by hiring a team of seasoned professionals who first worked together over two decades ago. Our group services the financial needs of privately owned businesses, their owners and senior managers. The majority of our client relationships can be measured in decades. CB Private & Commercial Banking offers a wide variety of business and personal banking products and services. The bank's growing network of banking groups has adopted our team's "Only Client" service model. We strive to make every client feel as though they are our only client by using a single point of contact. We achieve our vision by taking pride in delivering memorable service to our clients, seven days a week, through high touch, high tech service.

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Lockton is the world's largest independent, privately owned commercial insurance brokerage, employing more than 6,000 people in over 70 offices worldwide. Lockton provides insurance brokerage, risk management consulting, retirement services, and employee benefits services globally to businesses of all sizes in nearly every industry. For more information about Lockton's insurance and risk management services, please contact Adam McDonough, Executive Vice President, Lockton Insurance Brokers at (415) 568-4106.

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Office (347) 293-0084  
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Contact: Scott Offerman, [scott@1031financial.com](mailto:scott@1031financial.com)

Direct: 917-887-0166

Contact: Mark Cherlin, [mcherlin@nextrendsecurities.com](mailto:mcherlin@nextrendsecurities.com)

Office: 972-661-1283, Ext. 4



1031 Financial specializes in working with professional advisors including but not limited to attorneys, accountants and qualified intermediaries to help their clients with Delaware Statutory Trust (DST) real estate transactions. Our firm represents some of the largest DST sponsors by offering professionally managed, institutional grade properties, with the added benefit of being able to replace debt on a non-recourse basis. It is important to note that our Broker Dealer, NexTrend Securities, Inc., has been in business since 1997 and focuses exclusively on DSTs.

DST real estate investments are for accredited investors only (a net worth of greater than 1 million dollars – exclusive of primary residence along with other qualifications). Although speculative in nature, DST investments may provide advantages for high net worth accredited investors, such as the potential for capital gains tax deferral (1031 exchange), asset protection, and balance sheet advantages. There are material risks associated with ownership of Real Estate and DSTs, including but not limited to tenant vacancies, loss of entire principal amount invested, and that potential cash flows, returns, and appreciation are not guaranteed. Securities offered through NexTrend Securities Inc., (OSJ) PO Box 12108 Austin, TX 78711 972-661-1283, Ext. 3. Member FINRA/SIPC. NexTrend Securities Inc., and 1031 Financial are independent and unaffiliated separate entities. Neither NexTrend Securities nor 1031 Financial provide tax advice.

## **Accruit, LLC**

1331 17th St. Ste. 1250  
Denver, CO 80202

Contact: Elina Manevich [elinam@accruit.com](mailto:elinam@accruit.com)



EMP, a subsidiary of Accruit, LLC, is proud to debut its premier cloud-based, 1031 back-office platform - Exchange Manager Pro. EMP continues Accruit's tradition of leading the market in technology innovation with its revolutionary managed services offering. EMP enables title companies, boutique qualified intermediaries and banks to focus on scaling their core business by handling client back-office functions, such as: processing, administration and fund tracking. EMP's parent company - Accruit, was founded in 2000 and boasts 3 former FEA presidents on staff. FEA members since 2001, Accruit leadership is nationally renowned for their contribution and advocacy in the 1031 exchange arena. For more information, please visit [www.accruit.com](http://www.accruit.com).

## **Alma Bank**

31-10 37th Avenue Suite 400  
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Contact: Chris Abelt [CAbelt@almabank.com](mailto:CAbelt@almabank.com)



Alma Bank is a state-chartered community bank based in Astoria, NY that offers commercial and consumer banking services, with total assets as of 12/31/18 of \$1.14 billion. The bank offers a full range of business banking services – from commercial and multi-family real estate and commercial & industrial lending to business checking, savings and cash management services. We listen closely to our customers- in order to identify their particular financial / banking needs and then providing highly customized, effective and personalized banking solutions.

## **BankUnited, N.A.**

5 International Drive, Suite 100  
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BankUnited, N.A., a national bank and wholly-owned subsidiary of BankUnited, Inc. (NYSE: BKU), is headquartered in Miami Lakes, Florida with 95 branches in 15 Florida counties and six banking centers in the New York metropolitan area at September 30, 2016. One of the largest independent depository institutions headquartered in Florida by assets, BankUnited provides a wide range of commercial and consumer banking services. The National Deposits Group specializes in, and has exclusive product offering for Qualified Intermediaries. Our group has over 25 years of experience with the 1031 and title insurance space and have supported FEA for several years. We also help educate on fraud protection. For additional information, visit [www.BankUnited.com](http://www.BankUnited.com). BankUnited can be found on Facebook at [facebook.com/BankUnited.official](https://www.facebook.com/BankUnited.official) and on Twitter @BankUnited.

## **Capital One**

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Kay Properties and Investments, LLC is a national Delaware Statutory Trust (DST) investment firm with offices in Los Angeles, San Diego, San Francisco, Seattle, New York City and Washington DC. Kay Properties team members collectively have over 114 years of real estate experience, are licensed in all 50 states, and have participated in over 9 Billion of DST real estate. Our clients have the ability to participate in private, exclusively available, DST properties as well as those presented to the wider DST marketplace; with the exception of those that fail our due-diligence process. To learn more about Kay Properties please visit: [www.kpi1031.com](http://www.kpi1031.com). There are material risks associated with investing in real estate, Delaware Statutory Trust (DST) properties and real estate securities. These include tenant vacancies, potential loss of investment principal, that past performance is not a guarantee of future results, that potential cash flow, potential returns and potential appreciation are not guaranteed in any way and that real estate is typically an illiquid investment. For an investor to qualify for any type of investment, there are both financial requirements and suitability requirements that must match specific objectives, goals and risk tolerances. IRC Section 1031, IRC Section 1033 and IRC Section 721 are complex tax codes therefore you should consult your tax or legal professional for details regarding your situation. This material is not intended as tax or legal advice. Securities offered through registered representatives of WealthForge Securities, LLC, Member FINRA/SIPC. Kay Properties and Investments, LLC and WealthForge Securities, LLC are separate entities.

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Contact: Nathan Gwazdz [ngwozdz@lbsavings.com](mailto:ngwozdz@lbsavings.com)



Founded in 1983 in Santa Rosa, California, Luther Burbank Savings is a California based commercial bank focused on real estate lending and retail deposits with over \$7 billion in assets. The Bank offers business customers boutique-quality service along with access to banking solutions that meet their unique financial needs • Business Checking account plus Cash Management Services • Money Market account with competitive rates • 3-12 Month Business CD • Free online and mobile banking • FDIC insured to \$250,000. For more information, please visit [www.lutherburbanksavings.com](http://www.lutherburbanksavings.com). Equal Housing Lender.

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Contact: Spencer Taylor, [spencer@millcreekcommercial.com](mailto:spencer@millcreekcommercial.com)



Millcreek Commercial provides debt-free tenant-in-common ownership shares in high quality commercial real estate. We focus on making safe, secure, and stable commercial real estate investments available at a price point not typical for this exclusive asset class. Our assets are ideal passive investments with stable, corporate guaranteed monthly cash flows requiring little to no involvement by the owner. Millcreek Commercial is 1031 exchange qualified and retirement account compliant.

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[www.peregrine1031.com](http://www.peregrine1031.com)

Contact: Wolf Hanschen, [wolf@peregrinelp.com](mailto:wolf@peregrinelp.com)



Peregrine 1031 Energy Partners helps clients looking to diversify their 1031 exchange proceeds into more than traditional real estate, especially with the low cap rates we are seeing in the market today. Peregrine's experienced team has worked with hundreds of QI's over the past 15 years to help source over \$250 million in oil and gas royalties for their clients exiting traditional real estate and looking for options. Over the past two decades, the founders of Peregrine have established relationships with mineral right owners around the country which provide a consistent pipeline of oil and gas properties available for acquisition by cash and 1031 investors.

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Seacoast Commerce Bank is a commercial bank headquartered in San Diego that focuses on the needs of small businesses throughout the Western United States. Our mission is simple: provide clients with exemplary service, and the products and services to grow their business faster and easier. We achieve this by developing long lasting relationships with our clients through professional expertise, customized banking solutions, and access to executive management. For the 1031 Exchange Industry we offer competitive rates for both the segregated account structure and trust structure. A few of the services we offer are the use of escrow agreements, a marketing agreement, a full line of cash management services and the choice of multiple statements being sent out to both you and your clients. We also have a dedicated team of bankers with the expertise and experience to give you the great service that the 1031 Exchange Industry has come to both expect and deserve.

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Signature Bank (NASDAQ: SBNY) is a full-service commercial bank with almost \$50 billion in assets and 31 financial centers throughout the New York metropolitan area, in Connecticut and in California. Headquartered in New York City, the Bank specializes in serving the financial needs of privately owned businesses, their owners and senior managers – a group of clients who often find themselves underserved. Signature Bank's proven service model offers clients a single point of contact via a dedicated Private Client Group. Every Private Client Group is supported by experienced professionals, robust products and deep resources in order to provide exceptional service while fulfilling all of our clients' financial needs. The Bank's unique organizational structure combines small-bank responsiveness with large-bank experience and capability – truly the best of both worlds. The Ende / Greenberg Private Client Group at Signature Bank possesses decades of experience in fulfilling their clients' deposit escrow service and operational banking needs. Signature Bank is one of America's 40 largest banks with the most deposits (per S&P Global Intelligence, as of 9.30.2018) and has been ranked by Forbes as one of the Best Banks in America for nine consecutive years.

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TriState Capital Holdings, Inc. (NASDAQ: TSC) is a bank holding company headquartered in Pittsburgh. TriState Capital Bank also has regional offices in Philadelphia, Cleveland, Edison, N.J., and New York City. We are a niche, commercial bank that focuses on selected lines of business including commercial middle market banking, specialty transaction

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