

The Process of Connecting Clients and Prospects with the Deferred Sale Trust

The typical process we follow for a new prospect is as follows:

- ❖ You will identify a seller of an appreciated asset who MAY benefit from using the DST to defer the recognition and payment of capital gains.
- ❖ Inform the prospect that you have an available program that will:
 - Help them sell their property, business, etc and defer the payment of capital gains taxes
 - For a 1031 Exchange Client... Provide an insurance policy of sorts, with no upfront cost or obligation, in the event:
 - No suitable replacement property can be found; or if the upside transaction fails for any reason... that you can still help them achieve tax deferral on the gain on their original sale.
 - AND, if a 1031 fails the client can still defer their taxes and retain the option to invest the sales proceeds into a diversified portfolio of marketable securities or other investments, or take their time to identify the right real estate opportunity to reinvest into.
- ❖ You will then either enter this client into your mydstplan.com/yourusername website or call your Trustee to discuss the details of the proposed transaction.
 - Either way, the Trustee will reach out to you for details of your proposed transaction and analyze it with **you** first.
 - Based on our discussion and analysis, we will typically schedule a conference call with the client, during which:
 - The Trustee will share his analysis and describe the benefits of using the DST for their transaction (if appropriate) * Note: We will always give unbiased advice, even if it means telling the client that the DST would not be the most economically viable solution for them. The principle here is that the Trustee is YOUR partner and will only recommend the DST if is the most appropriate solution. If there are other possible solutions with similar value, we will discuss these as well, but those alternate solutions will generally not cause you to lose the primary transaction.

