



The Voice of the 1031 Industry

# Thanks To Our 2021 Sponsors

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### WEDNESDAY RECEPTION

#### **MUFG Union Bank N.A.**

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[mufgamericas.com/partner](http://mufgamericas.com/partner)

Contacts: Christine Foley, [CFoley@us.mufg.jp](mailto:CFoley@us.mufg.jp)  
Louis Mitchell, [louis.mitchell@unionbank.com](mailto:louis.mitchell@unionbank.com)



MUFG Union Bank, N.A., is a member of Mitsubishi UFJ Financial Group (MUFG). MUFG is headquartered in Tokyo and has a global network that includes over 1,800 locations in more than 50 countries. With close to 150,000 employees and approximately 300 entities worldwide, MUFG provides access to commercial banking, trust banking, securities trading services, credit cards, consumer banking and finance, asset management, leasing, and other services. Through close partnerships with its operating companies, MUFG aims to “be the world’s most trusted financial group” by responding flexibly to customers’ financial needs, serving society, and fostering shared and sustainable growth for a better world.

### THURSDAY RECEPTION

#### **Syndicated Equities**

350 North LaSalle Street, Suite 800  
Chicago, IL 60654  
(312) 640-9020  
[www.syneq.com](http://www.syneq.com)

Contacts: Tracy Treger, [ttreger@syneq.com](mailto:ttreger@syneq.com)  
Jessica Healy, [jhealy@syneq.com](mailto:jhealy@syneq.com)



#### **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 fractional interests in a larger, institutional-quality property (Delaware Statutory Trust, Tenancy-In-Common, or Land Trust), as well as sole ownership through its Net Lease Brokerage Division. 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 1031-compatible investments are stabilized credit-tenant, net-leased and multifamily properties, including industrial, retail, office, medical, and government assets across the country. We also offer real estate investment opportunities outside of the 1031 context in development projects, self-storage, parking facilities, student housing, and hotels. 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 Equities’ investments are offered via Metropolitan Capital Investment Banc, Inc., a member of FINRA and SIPC.

### THURSDAY LUNCH

#### **Realized Holdings, Inc.**

400 W. 15th St. Suite 700,  
Austin, TX 78701  
(877) 797-1031  
[www.realized1031.com](http://www.realized1031.com)

Contacts: Rob Johnson, [rjohnson@realized1031.com](mailto:rjohnson@realized1031.com)  
Sam Kohler, [skohler@realized1031.com](mailto:skohler@realized1031.com)



Realized is an end-to-end platform that helps you exchange 1031-eligible properties for diversified portfolios of tax-efficient property interests, customized to your shifting income goals, risk appetite, and investment objectives across generations. We strive to develop diversified portfolios with tax-efficient properties that are customized to the investor’s unique needs. Areas of focus include Delaware Statutory Trust, 1031 Exchange, DST Secondary Market, UPREIT, Qualified Intermediary, NNN Tenant Profiles, Tenants In Common, Qualified Opportunity Zones and Capital Gains Tax Rates. With nearly 60 years of collective experience and over \$50 billion of real estate transactions behind us, we have the expertise and the tools to help you through this major financial decision — and now you do as well.

## FRIDAY LUNCH

### **ExchangeRight Real Estate**

1055 E. Colorado Blvd, Suite 310  
Pasadena, CA 91106  
(855) 317-4448  
[www.exchangeright.com](http://www.exchangeright.com)

Contact: David Fisher [david@exchangeright.com](mailto:david@exchangeright.com)



ExchangeRight Real Estate is a full-service real estate company specializing in investment-grade, net-leased real estate structured as DSTs (Delaware Statutory Trusts). We manage over \$900MM in assets comprised of 265+ single-tenant retail and healthcare properties and 52 apartment communities consisting of 6,500 units across 28 states. Our investment strategy is designed around the goal of protecting and preserving investor capital by building portfolios of necessity-based, net-leased properties backed by strong, credit tenants as well as Class B apartments with stable income and value-added upside potential. We look to aggregate 10-20 properties per portfolio in order to provide diversification and reduce risk, while purchasing in strong population areas with low crime rates and high-traffic counts. Through long-term leases and 10-year fixed financing we seek to provide durable income for our investors. We seek to provide investors with safety, security, and peace of mind in their exchange.

## GOLD SPONSORS

### THURSDAY BREAKFAST

#### **Capital Square**

Capital Square  
10900 Nuckols Road, Suite 200  
Glen Allen, VA 23060  
(877) 626-1031 TF  
(804) 290-7900  
[www.CapitalSquare1031.com](http://www.CapitalSquare1031.com)

Contact: James Brunger [jbrunger@capitalsquare1031.com](mailto:jbrunger@capitalsquare1031.com)



Capital Square is a national investment sponsor specializing in tax-advantaged real estate offerings, including Delaware statutory trusts and qualified opportunity zone funds. The firm is a leading sponsor of Delaware statutory trust offerings for investors seeking replacement property as part of a Section 1031 exchange and cash investors. Capital Square sponsors turn-key real estate investment offerings with low investment minimums to provide investors access to larger and higher quality real estate than they would be able to acquire on their own.

### FRIDAY BREAKFAST

#### **Mountain V Oil & Gas, Inc.**

415 Heliport Loop Road  
PO Box 470  
Bridgeport, WV 26330  
(304) 842-6320  
[www.mountainvoilandgas.com](http://www.mountainvoilandgas.com)

Contact: Mike Shaver [smsnaver@earthlink.net](mailto:smsnaver@earthlink.net)



Headquartered in Bridgeport, West Virginia, Mountain V Oil & Gas, Inc. was founded in March 1994 by Steve and Mike Shaver to acquire and develop oil and gas reserves in the Appalachian Basin. Mountain V Oil & Gas, Inc. is a privately held exploration and production that has operated in the Appalachian Basin for over 24 years. The company has been successful during its 24 year history operating in West Virginia and Pennsylvania, acquiring and divesting over 2,011 wells and drilling more than 591 wells (primarily in the Upper Devonian Formation).

## SILVER SPONSORS

### TOTE BAG

#### **Customers Bank, CB Private & Commercial Banking – NY**

101 Park Avenue, Suite 1101  
New York, NY 10178  
(212) 843-2488  
[www.customersbank.com](http://www.customersbank.com)

Contact: Eugene Kennedy [ekennedy@cbpcb.com](mailto:ekennedy@cbpcb.com)



Customers Bank, a subsidiary of Customers Bancorp, Inc. (NYSE: CUBI) a bank holding company, is a full-service super-community bank with assets of approximately \$18.8 billion on March 31, 2021. CB Private & Commercial Banking offers a wide variety of business and personal banking products and services. CBPCB goes to market by delivering on its Single Point of Contact service model which provides a top-of-class, private banking level customer service experience to its clients. Clients are managed by dedicated and empowered

Banking Groups that have deep experience within the focused industries and markets that they serve. Complementing this personalized High-Touch service model, we provide a High-Tech approach that will provide the client with multimodal access and the latest products and services.

### ELECTRONICS CHARGING STATION

#### **Capital One Bank**

Capital One Bank  
1307 Walt Whitman Road  
Melville, NY 11747  
(504) 352-6225  
[www.capitalone.com](http://www.capitalone.com)

Contact: Mario D'Amore [mario.damore@capitalone.com](mailto:mario.damore@capitalone.com)



Capital One® offers a broad spectrum of financial products and services to consumers, small businesses, and commercial clients. Spark Business® from Capital One offers a diverse suite of financial products, tools and services designed specifically for small businesses, including banking products like business checking and savings accounts, credit cards with unlimited rewards, and services like Capital One Escrow Express, a state-

of-the-art, virtual sub-accounting system that allows customers to manage and track 1031 exchange/escrow funds easily and efficiently. Today, Capital One works to address the unique needs of millions of business owners across the U.S., so they can focus on what they are most passionate about – running and growing their business.

### NAME BADGE LANYARD

#### **Lockton Insurance Brokers, LLC**

Three Embarcadero Center, Suite 600  
San Francisco, CA 94111  
(415) 568-4106  
[www.lockton.com](http://www.lockton.com)

Contact: Adam McDonough, [amcdonough@lockton.com](mailto:amcdonough@lockton.com)



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.

## CONFERENCE MOBILE WEBSITE

### **Independent Financial**

7777 Henneman Way  
McKinney, TX 75070  
(469) 301-2664  
[www.independent-bank.com](http://www.independent-bank.com)

Contact: Mark Huck [mhuck@ibtx.com](mailto:mhuck@ibtx.com)



Independent Financial was founded on the belief that we have a deep responsibility to solve problems and build strong, healthy communities. Our strength lies with our employees, who share a genuine desire to help people make a more fulfilling life for themselves and those around them. As a multi-billion-dollar

community financial institution, we provide a variety of relationship-driven banking products and services for small to large business, professional firms, and community organizations. We also have the expertise to serve the sophisticated financial needs of entrepreneurs and deliver banking convenience to families on-the-go. Member FDIC Equal Housing Lender.

## EXHIBITING SPONSORS

### **1031 Financial**

321 West 44th Street, Suite 200  
New York, NY 10036  
(917) 887-0166  
[www.1031financial.com](http://www.1031financial.com)

Contact: Scott Offerman, [scott@1031financial.com](mailto:scott@1031financial.com)



1031 Financial is a financial firm which focuses solely on investors' needs in the real estate space. We help educate, source, and provide investment options specifically for individuals selling investment property who want to defer capital gains. 1031 Financial works with high end real estate sponsors offering fractional ownership in

real estate programs that are institutional grade and are professionally managed with an added benefit of being able to replace debt on a non-recourse basis. Delaware Statutory Trust (DSTs) real estate investments are only available to accredited investors (\$1 million net worth excluding primary residence or \$200,000 income individually/\$300,000 jointly for the prior two years and same expected going forward). There are material risks associated with the ownership of 1031 DST Real Estate investments, including but not limited to tenant vacancies, loss of entire principal amount invested, and potential cash flows, returns, and appreciation are not guaranteed. Securities offered through TCFG Wealth Management, LLC Member: FINRA, MSRB & SIPC. Advisory Services through TCFG Investment Advisors, LLC a Registered Investment Advisor. Visit us at <http://tcfgcompanies.com/> TCFG Wealth Management, LLC, and 1031 Financial are unaffiliated. Scott Offerman, 1031 Financial and TCFG Wealth Management, LLC, are not tax advisors and do not provide tax advice.

### **Exchange Manager Pro<sup>SM</sup>**

55 Madison St. Suite 625  
Denver, CO 80206  
(800) 237-1013  
[Exchange Manager Pro](http://Exchange Manager Pro)

Contact: Brent Abrahm [brenta@accruit.com](mailto:brenta@accruit.com)



For Qualified Intermediaries seeking a state-of-the-art patented technology to process and manage 1031 exchanges, Exchange Manager Pro<sup>SM</sup> cloud-based SaaS solution automates and simplifies the complete 1031 workflow. Exchange Manager Pro<sup>SM</sup> handles the administering and fund tracking of 1031 exchanges, enabling clients to focus on their customer relationships. This 1031 Exchange technology drives businesses forward with efficient workflows and the execution of secure online processing supported by industry leading professionals. Make sure to stop by our booth to see if Exchange Manager Pro<sup>SM</sup> is the right solution for your 1031 business.

## **Four Springs Capital Trust**

1901 Main Street  
Lake Como, NJ 07719  
(732) 749-7339  
[www.fsctrust.com](http://www.fsctrust.com)

Contact: Heather Ahrens [hahrens@fscap.net](mailto:hahrens@fscap.net)



Four Springs TEN31 Xchange specializes in tax deferred real estate exchanges, including DSTs, whole properties and 721/UPREIT exchanges. Our firm works with broker-dealers, Registered Investment Advisors and other tax and financial planning firms to provide customized tax deferred exchange solutions for real estate planning and investment objectives. Our Property Exchange Program (PXP) offers owners of single tenant net leased properties the ability to contribute their properties to Four Springs Capital Trust in exchange for Operating Partnership Units (OP Units), which our exchangeable for REIT shares (UPREIT Exchange).

## **Millcreek Commercial**

2100 W. Pleasant Grove Blvd, Suite 200  
Pleasant Grove, UT 84062  
(303) 253-2263  
[millcreekcommercial.com](http://millcreekcommercial.com)

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



**MILLCREEK**  
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Millcreek Commercial provides fractional, tenant in common deeded interests in high quality, investment grade commercial real estate. Our “have it your way” approach gives your clients flexibility and access to enjoy monthly passive income by co-owning premium commercial real estate that is both recession resilient and fully managed. Because of the passive nature of a NNN lease, your clients won’t have to worry about tenants, trash, and toilets—the typical headaches that come with being a residential landlord. Learn how you can the discover freedom that comes through a commercial real estate investment at [millcreekcommercial.com](http://millcreekcommercial.com)

## **Northern Bank and Trust Company**

275 Mishawum Road  
Woburn, MA 01801  
(781) 569-1852  
[www.nbtc.com](http://www.nbtc.com)

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 follow the Northern Bank on Facebook (/NorthernBankMA/), Twitter (@northernbankma), and LinkedIn (company/northern-bank-ma/).

## **Peregrine 1031 Energy Partners**

4228 N. Central Expressway, Suite 370  
Dallas, TX 75206  
(214) 483-1997  
[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.

## **Signature Bank**

565 5th Avenue, 16th Floor  
New York, NY 10017  
(646) 822-1946  
[www.signatureny.com](http://www.signatureny.com)

Contacts: Eric Ende, [eende@signatureny.com](mailto:eende@signatureny.com)  
Glenn Greenberg, [ggreenberg@signatureny.com](mailto:ggreenberg@signatureny.com)



SIGNATURE BANK®

Signature Bank (NASDAQ: SBNY) is a full-service commercial bank with nearly \$100 billion in assets and 37 private client offices throughout the New York metropolitan area, in Connecticut, California, and North Carolina. 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 25 largest banks with the most deposits\* and has been ranked by Forbes as one of the Best Banks in America for eleven consecutive years. \*Source: S&P Global Market Intelligence, as of December 31, 2020. Excludes foreign-owned U.S. bank subsidiaries and other deposit-taking non-branch companies such as broker-dealers, credit card companies, issuers and processors.

## **Stan Johnson Company**

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New York, NY 10016  
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Contact: Tom Georges, Director, [tgeorges@stanjohnsonco.com](mailto:tgeorges@stanjohnsonco.com)



**Stan Johnson Co.**

THE NET LEASE AUTHORITY®

Stan Johnson Company is the nation's largest commercial real estate brokerage and advisory firm focused exclusively on Single-Tenant, Net Lease properties. In addition to 1031 replacement property acquisition services, the firm also provides disposition, capital markets and advisory services for institutions, developers, investment funds and private investors. Now in its fourth decade of serving as a

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5 International Drive, Suite 100  
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(914) 305-9428  
[www.bankunited.com](http://www.bankunited.com)

Contact: Karen Gladding [kgladding@bankunited.com](mailto:kgladding@bankunited.com)  
Cell: (914) 584-4141



**BankUnited**

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://facebook.com/BankUnited.official) and on Twitter @BankUnited.