

MANAGE EXCHANGE AND PROFESSIONAL RISK WITH THE MIDWEST'S PREMIER SECTION 1031 RESOURCE



QUALIFIED
INTERMEDIARY
SERVICES



IPE 1031
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Top Considerations When Selecting Your Qualified Intermediary

- **Proven Track Record:** IPE 1031 is the Midwest's leading independent qualified intermediary company and has successfully accommodated thousands of exchange transactions totaling over 2 billion dollars in value.
- **Unequaled Expertise:** IPE 1031 has full service, highly qualified personnel on staff and the only Certified Exchange Specialist in the states of Iowa and Nebraska.
- **Specialized Solutions:** IPE 1031 serves as the Midwest's premier exchange resource by providing customized services and solutions to exchangers and practitioners.
- **In-House Expertise:** All exchanges, including delayed, reverse, improvement and personal property exchanges, are accommodated in-house.
- **Superior Security:** Exchange funds are placed in highly-rated financial institutions; placed only in segregated, non-pooled bank accounts; account statements are sent directly from the bank to exchangers; and custodial trust accounts are available.
- **Insurance Coverage:** IPE 1031 is one of few independent exchange companies with both a fidelity bond and an errors and omissions insurance policy.
- **Independent Financial Oversight:** Company financial and exchange account records are reviewed and reconciled by outside CPA and accounting professionals.
- **Relationship and Service Driven:** IPE 1031 places a high value on its exchangers and their advisors. At IPE 1031, exceptional service, professionalism, fair dealing and integrity can be expected.
- **Industry Leadership:** IPE 1031 is a member in good standing with the Federation of Exchange Accommodators (FEA), the only trade organization and governing body of the qualified intermediary industry. Dave Brown, President of IPE 1031, serves on the FEA's Board of Directors, as Chair of its Ethics Committee and was recently selected to serve as the Association's President Elect.

1031 EXCHANGE

PLEASE CONTACT US TO LEARN HOW IPE 1031 CAN SERVE AS YOUR COMPLETE 1031 EXCHANGE RESOURCE



David A. Brown, CES®, President and owner of IPE 1031, was raised in Swisher, Iowa. He is a graduate of the University of Iowa College of Business and Drake University Law School. Dave is a member of the Iowa State Bar Association, where he serves on the Tax Committee; the Federation of Exchange Accommodators, a trade organization dedicated to the promotion of client security, integrity and professionalism in the qualified intermediary industry, where he serves on the Board of Directors, as Chair of the Ethics Committee, and as President Elect; and the Realtors Land Institute. Prior to starting IPE 1031, Dave served as a state prosecutor. He holds the designation of Certified Exchange Specialist (“CES®”) and lectures on the subject of Section 1031 for events sponsored by the Iowa State Bar Association, Drake University Law School, the University of Iowa College of Law, the Realtors Land Institute, the Iowa Association of Realtors, and various other accounting, legal and real estate associations. Dave is a contributing editor to the Iowa State Bar Association Income Tax Manual. Email: dbrown@IPE1031.com



M. Kathleen Brown, Vice President and owner of IPE 1031, was born in Sioux City, Iowa and raised in the Minneapolis area. She received her undergraduate degree from Saint Mary’s College, Notre Dame, Indiana, and her law degree, with honors, from Drake University Law School, where she was a Note Editor for The Drake Law Review. She is a member of the Iowa State Bar Association and the Federation of Exchange Accommodators, a trade organization dedicated to the promotion of client security, integrity and professionalism in the qualified intermediary industry. Prior to joining IPE 1031, Katie was a partner at a law firm practicing in the area of litigation. Email: kbrown@IPE1031.com



Becky J. Petersen is an Exchange Officer for IPE 1031. Becky received her law degree, with honors, from Creighton University and served on the Creighton Law Review. She holds a B.A. in Finance from the University of Northern Iowa. Prior to joining IPE 1031, Becky served as Field Operations Director and Commercial Underwriting Counsel for Iowa’s Title Guaranty program and managed escrow operations for Title Guaranty’s Commercial Services Department. She is a member of the Iowa State Bar Association, where she is actively engaged in the Real Estate Section; and the Federation of Exchange Accommodators, a trade organization dedicated to the promotion of client security, integrity and professionalism in the qualified intermediary industry. Email: bpetersen@IPE1031.com

Building Strong Relationships.
Creating Customized Value.