



DST Educational Series A Part 1: Depth & Breath of knowledge for Investors About Delaware Statutory Trusts (DSTs)

Welcome DST News! Our goal is to provide non-biased education and market information for Accredited Investors on DSTs.

Introduction. Feb 1, 2022

Real estate Investing has provided many advantages for investors. For some investors access to debt may be limited thus limiting the size of the investment. Using debt or leverage may have increased risk (default or foreclosure) but has proven to increase potential returns. When you combined the real estate acquisition with tax advantages such as deferring capital gains and depreciation on the structure (land not depreciable) the 1031 tax deferred exchange (like-kind exchanges), have provided a wealth building tool for investors.

There is a very defined set of rules that may be complicated. The rules are at times confusing even for experienced investors. The best advice for investors seeking to utilize a strategy that utilizes the IRS code is to seek a competent tax professional or accounting professional. Section 1031 of the IRS code has been around for about a hundred years. Utilizing a DST to successfully perform an exchange does comply with the requirements and intricacies of the IRS code.

The scope of the information provided here may serve as a dive into the advantages and potential drawbacks of Delaware Statutory Trusts. This investment strategy may help manage and defer tax liabilities and purchase interests (fractional interest) in commercial-grade real estate. In most cases these acquisitions would simply be outside many investors' capacities.

Look for Part 2: Delaware Statutory Trust- What is it and why you should or may consider.

DST's (Delaware Statutory Trusts) are for accredited investors only. Contact your investment adviser for additional details on how a DST may be a solution to your 1031 Exchange and compliment your financial objectives. For more information on how to properly set up an IRC 1031 Tax Deferred Exchange or if you are an accredited investor and would like additional information on a DST contact Al DiNicola at 239-691-8098 or email adinicola@namcoa.com.

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