



DST Education Series A Part 2- What is it and why you should or may consider.

Welcome DST News! Our goal is to provide non-biased education and market information for Accredited Investors on DSTs. We hope to provide a Depth & Breath of knowledge for Investors About Delaware Statutory Trusts (DSTs).

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A Delaware Statutory Trust (DST) is a relatively new vehicle providing individual investors access to large institutional grade commercial properties. These properties typically are large the financial size than what a individual would be able to purchase. Large commercial properties are owned by pension funds, Real Estate Investment Trust (REITs), insurance companies and other large fund who can deploy private or public funds.

For those cash investors and potentially more importantly the investors seeking to utilize a 1031 exchange strategy the DST option can be very valuable. Especially when purchasing (replacement of property for 1031 investors) and when the DST investment is sold (the exit). The advantages include not only deferring the capital gains and recapture of depreciation but also tax advantaged passive income (monthly/quarterly).

One of the first concerns of real estate investors is the management of the property. DSTs are professionally managed investments providing a relief to investors. The type of DST properties includes many of the same types of properties but on a larger scale including:

- Apartment buildings (multifamily)
- Student Housing
- Manufactured Housings
- Retail
- Office
- Medical Office
- Industrial buildings

DSTs are pre-packaged by design to offer investors a selection of asset style as well as geographic locations. While there is a minimum to invest, most DST acquisitions are easily obtainable by accredited investors (qualification reviewed later). Some of the advantages enable investors to diversify portfolios without any landlord duties and provide monthly income with significant tax advantages. This is a passive investment, and the properties are professionally managed. More details in later informational session.

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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