

1031 EXCHANGE CASE STUDY

Evelyn's¹ 1031 Success Story



EVELYN'S DIVERSIFIED PORTFOLIO

(includes various DST property types across multiple states)

- Investor
- Owned and managed multiple properties in Long Beach, CA
- No longer wanted active management
- 1031-exchanged all properties into Kingsbarn's DSTs

**Return on equity:
increased by 15%**



KB Tangent Logistics, DST

Property Type: Industrial
Location: Tangent, OR
Annual Cash Flow: 5.85%



**KB Redhawk
Medical Center, DST**

Property Type: Medical
Location: Temecula, CA
Annual Cash Flow: 6.00%



KB Ohio Logistics, DST

Property Type: Industrial
Location: Bowling Green, OH
Annual Cash Flow: 4.50%



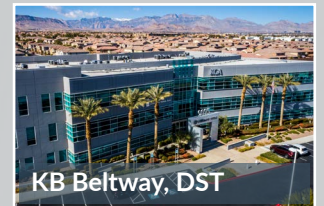
KB Mill Creek, DST

Property Type: Office
Location: Laguna Hills, CA
Annual Cash Flow: 5.00%



KB Village View, DST

Property Type: Office
Location: Henderson, NV
Annual Cash Flow: 3.75%



KB Beltway, DST

Property Type: Office
Location: Las Vegas, NV
Annual Cash Flow: 5.50%

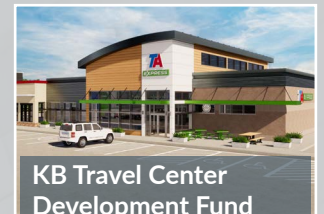


**KB True-Yield[®] Real Estate
Dividend Fund**

Annual Preferred Return:
9.75%

KB Dividend & Development Funds

Evelyn has also invested in the KB True-Yield Real Estate Dividend Fund and the KB Travel Center Development Fund. Both are reliable sources of income and cash flow. The Funds pay commissions for as long as your client is invested in them.



**KB Travel Center
Development Fund**

Annual Preferred Return:
13.75%

✓ PROBLEMS SOLVED

- Invested over \$42+M in Kingsbarn DST interests + Funds
- Diversified her portfolio geographically and by asset class
- Now has monthly passive income
- Relieved of all management duties

IMPROVED CASH FLOW

*Total Portfolio Value: **\$42,083,888**

*Annual Cash Flow: **\$2,573,325**

*Portfolio Cash Flow (%): **6.11%**

**As of 3/2024. Includes Investment Funds.*

1) While all information contained within this document is true and factual, a pseudonym has been used to protect the investor's privacy.