



Exchange Assistant Job Description

This position reports directly to the Senior Exchange Officer to assist with all aspects running the day-to-day operations of the 1031 exchange department and assisting clients with their 1031 exchanges.

About the Company:

Growth 1031, Inc. is a 1031 Exchange Accommodator headquartered in San Diego, California, representing clients nationwide. We are experienced at facilitating successful 1031 exchanges whether you own a single investment property, small rental units, large institutional investments, multi-units, or raw land, we help you defer taxes and build wealth.

Responsibilities

Responsibilities include, but are not limited to:

- Pull weekly reports and present to CEO
- Manage CEO's calendar and scheduling
- Organize / Coordinate Company Events & Workshops
- Answer office line phone calls, taking messages, and answering basic 1031 Exchange questions and client requests
- Data entry into the client relationship management ("CRM") system
- Prepare Exchange Documents
- Coordinate closings with escrow and title companies
- Prepare instructions to accounting for incoming wires and outgoing wires
- Responding to client inquiries via letter or email
- Creating and Managing digital marketing material,
- Organizing and Filing Documentation and Paperwork
- Ordering office supplies as needed
- Assist Senior Exchange Officer with any other administrative needs
- other duties as assigned

Minimum Qualifications

- Strong customer service skills: ability to interact professionally with customers and co-workers
- College degree and/or 2 years experience in real estate.
- Experience working in office environment.

- Excellent organizational skills and the ability to excel at multi-tasking. • Strong interpersonal skills and communication skills (oral and written)
- Self-starter, self-disciplined and ability to work unsupervised.
- Ability to handle highly sensitive and confidential information relevant to the operation of the organization.
- Knowledge of Microsoft Office and Gmail
- Strong organization skills & attention to detail
- Ambitious drive to succeed in the area of commercial real estate or law
- Self-motivated with minimal supervision