

Unlock Passive Income Through a 721 Exchange

Multifamily Investing, Simplified.

A 721 Exchange into the HZ Evergreen Fund offers an attractive alternative to traditional 1031 exchanges, allowing property owners to seamlessly contribute investment properties in exchange for fund shares. Investors can gain immediate tax deferral benefits, diversification, and professional asset management without the complexities and burdens of leverage replacement.

Key Benefits of a 721 Exchange with the HZ Evergreen Fund

Tax-Efficient

Predictable, durable cash flow structured with tax advantages.

Increased Diversification

Access to our curated portfolio of multifamily properties across strategic U.S. markets.

Leverage Replacement

The HZ Evergreen Fund manages portfolio debt, eliminating the challenge and cost for individual investors to replace existing debt.

Passive Ownership

Properties are professionally managed by Hamilton Zanze, eliminating operational burdens for investors.

Trusted Experts, Exceptional Service

For 25 years, we've helped investors navigate the exchange process with clarity and confidence, making complex transactions feel seamless.



Bluebird Row, Chattanooga, TN

How it Works

- 1 Initial Consultation**
Meet with our team to discuss your goals and evaluate your property's eligibility for fund contribution.
- 2 Valuation & Due Diligence**
Hamilton Zanze conducts a professional valuation and thorough property review.
- 3 Exchange Documentation**
We will prepare the documentation. Consult with your legal and tax advisors before proceeding.
- 4 Contribution to Fund**
Hamilton Zanze facilitates the transfer of your property into the HZ Evergreen Fund, providing you with tax deferral and fund shares in exchange.
- 5 Ongoing Management**
Assets are professionally managed with transparent financial reporting.

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The HZ Evergreen Fund

The Fund provides unprecedented access to our portfolio of institutional-quality, multifamily real estate investments targeting business-friendly growth markets nationwide. It's designed to deliver predictable income, long-term appreciation, capital preservation, and meaningful tax protection.

Target Markets

In its initial phase, the Fund is targeting 50 carefully selected apartment communities from our existing portfolio, spanning 13 states across the U.S.



By the Numbers

The HZ Evergreen Fund's expected size and scale over the coming years:

Properties Targeted	Percentage Occupied	Average Years Held
50	94%	5
# of States	Net Asset Value	Average Vintage
13	\$1.3^B	2003

Contact Us

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