

The 1031 platform your QI clients will bank on.

Partner with DeferAlly to give qualified intermediaries one place to run every exchange, connected to your online banking, sub-ledger, payment rails and core.

Grow sticky deposits

Give QI clients the platform they run every exchange on, so their escrow deposits stay with you.

Win and keep QI relationships

A modern, branded experience that sets your bank apart.

You stay in control

Your core, sub-ledger and payment rails stay the systems of record. DeferAlly never holds or moves funds.

LIVE TODAY

- Automatic 45 and 180-day deadlines and reminders
- Per-exchange escrow ledger and interest tracking
- 45-day identification checks and designation notices
- Document checklists, W-9 collection and AllySign e-signatures
- White-label client portal: funds, deadlines and documents
- Email and text updates with delivery logs
- Ally, the AI copilot that reads contracts and flags mismatches

Bank integration roadmap

Built with our launch bank partners, on the systems you already run.

IN DEVELOPMENT

Single sign-on from your online banking

QIs go straight from your banking portal into DeferAlly. SAML 2.0 and OpenID Connect.

IN DEVELOPMENT

Sub-account setup in your sub-ledger

Opening or closing an exchange, interest splits and W-9s create sub-account records automatically.

IN DEVELOPMENT

Payments over your existing rails

Wire, ACH, RTP and FedNow with dual approval, processed by your payment provider.

IN DEVELOPMENT

Real-time data from your core

Balances, transactions, payment status and reconciliation flow into every exchange.

How a partnership comes together

PHASE 1 · 2-4 WEEKS

Single sign-on and your branded platform live for QI clients.

PHASE 2 · 6-10 WEEKS

Sub-ledger account setup and real-time data from your core.

PHASE 3 · 8-12 WEEKS

Payments with dual approval through your payment provider.

Who builds what: DeferAlly builds the connectors and screens. Your bank provides sandbox access and a technical contact. **Data:** your bank and your QI clients own all of their data. **Security:** SOC 2 examination in progress, with controls mapped to NIST CSF 2.0. Security questionnaire and Mutual NDA available.

Become a launch bank partner.

Launch partners shape the roadmap, get priority build time and preferred commercial terms.

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