

Haselkorn & Thibaut Secures Successful Settlement for Investor in Delaware Statutory Trust (DST) Investment Loss Matter

Free case reviews for investors who suffered losses, damages, or interruptions in distributions from Delaware Statutory Trust (DST) investment.

JUNO BEACH, FL, UNITED STATES, July 10, 2026 /EINPresswire.com/ -- [Haselkorn & Thibaut, P.A., operating as Investment Fraud Lawyers](#), announced that it has obtained a successful settlement on behalf of an investor who experienced losses in connection with a [Delaware Statutory Trust \("DST"\) investment](#).

The matter, involving allegations concerning the recommendation, sale, and oversight of a DST investment transaction as part of a 1031 exchange strategy, was successfully resolved in connection with FINRA Case No. 25-02063. The investor alleged that the investment's risks, liquidity limitations, risk parameters and other material considerations were not adequately addressed before, during or after the investment was recommended.

The settlement was reached and the Financial Industry Regulatory Authority ("FINRA") arbitration process was concluded. While the case number is a matter of public record, the specific details and financial terms of the settlement remain strictly confidential.



Haselkorn & Thibaut Investment Fraud Lawyers



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“We are pleased to have helped our client obtain a successful resolution in this matter,” said Matthew R. Thibaut, founding partner of Haselkorn & Thibaut, P.A. “DST investments can be highly complex investment products with material risks and may not be known or appropriate for some investors. Financial professionals and brokerage firms have important obligations when evaluating, recommending, and supervising these complex products.”

A Delaware Statutory Trust (DST) is an investment vehicle that enables investors to acquire beneficial interests in institutional real estate. DSTs are commonly used in conjunction with Section 1031 exchanges, which may allow investors to defer capital-gains taxes following the sale of investment property.

However, in exchange for what in many products might be features that include potential tax deferral or other benefits and exposure to real estate investment(s), DST investors generally relinquish management authority and face significant limitations on liquidity, refinancing, and control over the underlying properties. These factors along with a number of other material risks may not be fully or properly disclosed to investors, and over time for other investors may involve market shifts and other risks or challenges facing various DST programs.

Haselkorn & Thibaut represents investors in claims involving alleged negligence or impropriety within the financial services industry including but not limited to: broker misconduct, unsuitable recommendations, inadequate due diligence, failure to disclose material risks, and Regulation Best Interest (“Reg BI”) violations. Since June 2020, broker-dealers and financial professionals have been required under Reg BI to act in their retail customers’ best interest when making investment recommendations and to disclose material risks, costs, and conflicts of interest. Unfortunately, that is not always the case.

The firm continues to investigate and review claims involving complex investment products including various DST programs and sponsors, including cases where investors have faced suspended or reduced distributions, debt maturity challenges, or sponsor-issuer level litigation.

“DST investments are legal, but the manner in which the issuers or products are reviewed, vetted, approved, represented, and marketed or sold to retail investors is not always appropriate, and not always appropriately supervised” Thibaut added. “We evaluate each case individually to determine whether the firm, the financial advisor, or any other party may have failed to meet industry standards.”

Haselkorn & Thibaut, P.A. offers free and confidential evaluations for investors who have suffered losses, or find themselves faced with an investment product that is complex or otherwise not performing in the manner that was previously represented, whether that be the result of various risks, other events, possible reduced distributions, liquidity or viability concerns, or other issues involving DSTs or other complex investment products. Many claims are handled on a contingency-fee basis, meaning legal fees are not owed unless a recovery is obtained.

For additional information and resources regarding DST investment losses, investors may visit Investment Fraud Lawyers.

About Haselkorn & Thibaut, P.A. / Investment Fraud Lawyers

Haselkorn & Thibaut, P.A., operating as Investment Fraud Lawyers, is a national securities litigation and FINRA arbitration law firm representing individual investors nationwide. Founding partners Jason S. Haselkorn and Matthew R. Thibaut are former Wall Street defense attorneys who represent investors in matters involving investment fraud, broker misconduct, unsuitable recommendations, private placement losses, and securities arbitration claims.

The firm has been involved in more than \$520 million in securities cases and reports a 98% success rate. Haselkorn & Thibaut is rated AV Preeminent by Martindale-Hubbell, and both founding partners have been selected as Super Lawyers.

Investors who suspect that they may have lost money in a Delaware Statutory Trust (DST) or 1031 exchange may contact Investment Fraud Lawyers for a free consultation at 1-888-885-7162 or through their [website at investmentfraudlawyers.com](http://investmentfraudlawyers.com).

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