



Payoff Form – Promissory Note, Deed of Trust/Mortgage

IMPORTANT INFORMATION

Use this form to process a payment or final payoff for a Promissory Note owned by your account.

Processing Options

Select an option below. If no option is selected, Directed IRA will process your request as normal (within 3 business days). I understand that if my account does not have sufficient funds, my transaction may not be processed.

- Next-Day Service (\$150) – Must be received by 4pm MST Same-Day Service (\$250) – Must be received by 10am MST

1. Account Owner Information

First Name: _____ MI: _____ Last Name: _____

Last 4 of SSN: _____ Date of Birth: ____/____/____ Phone Number: _____

Directed IRA Account Number: _____ Account Type: _____

2. Loan Information

Borrower Name: _____ Loan Number/Info: _____

Percentage of Ownership: _____

3. Payoff Information

This is a (select one): Full Payoff (or) Partial Payoff

Closing Date (if applicable): _____ Amount of Payoff: \$ _____

4. Agent Receiving Commission

Buyer's Agent Name: _____

Seller's Agent Name: _____

5. Return Executed Documents To

A copy of the signed investment documents will be scanned and emailed to you in accordance with our document handling policy. Please refer to the Investment Documentation section of your Custodial Account Agreement and Disclosure for more information about how documents are stored at Directed Trust Company.

Recipients Name: _____

Mailing Address: _____

City: _____ State: _____ Zip Code: _____

Additional Instructions/Notes: _____

- Regular Mail
 Overnight Mail (Charge my Directed IRA Account)
 Overnight Mail (Send via 3rd party billing): FedEx or UPS Account Number: _____
 Email to: _____ ATTN: _____
 Fax Number: _____

6. Payoff Instructions

Please select option A or B below:

A. Check

Make Check Payable To: _____

Mail Check To: _____

Mailing Address: _____

City: _____ State: _____ Zip Code: _____

B. Wire

Bank Name: _____ Routing Number: _____

Bank Account Name: _____ Account Number: _____

Reference Number: _____ Funding Deadline: ____/____/____

7. Acknowledgement & Signature

I have initialed and/or signed where appropriate, for each document Directed Trust Company (aka, Directed IRA) needs to initial/sign. I acknowledge that if there is an amendment or any subsequent documents submitted separate from this form for this transaction, I will need to sign the applicable pages as "Read and Approved" before Directed Trust Company will execute.

➤ _____
Account Owner Signature

Date

INVESTMENTS: NOT FDIC INSURED ■ NO GUARANTEE ■ MAY LOSE VALUE

Email Forms to:
Clients@directedira.com

Send Mail to:
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Phoenix, AZ 85012

Fax:
602-899-9396

Questions?
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Directed IRA is a tradename of Directed Trust Company, an Arizona Corporation