



Note Payoff, Note/Option Assignment, or Sale of Asset Note, Loan, Deed of Trust/Mortgage. Assignment of Note or Sale of Option

IMPORTANT INFORMATION

Use this form to process a final payoff from the borrower for a Promissory Note, Loan, Deed of Trust or Mortgage, that your IRA account is the lender on. Once final payment has been received the Asset will be booked off your IRA account. Also use this form for an Assignment of Note or Sale of Option Contract. We will need a copy of the Assignment or Purchase of Option Agreement.

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/Asset Information

Borrower Name/Asset Name on Record: _____ IRA Account % of Ownership: _____

3. Final Payment Information, (if applicable). If final payment has already been remitted, see section 4 below.

This is a (select one): Full Payoff or Assignment of Note/Sale of Option

Expected Final Payment Date: _____ Amount: \$ _____ Payment Method: Check Wire/ACH

Mail Check To Directed Trust Company 3033 N. Central Avenue, Suite 415 Phoenix, AZ 85012 Payable to: <i>Directed Trust Company</i> <i>FBO Clients Name, Account Type</i>	Wire Payment ABA #: 121000248 Swift Code: WFBIUS6S Directed Trust Company Account #: 8450721009	ACH Routing #: 124002971 Directed Trust Company Account #: 8450721009
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4. Remove Loan/Asset from Account

Final payment has been remitted to Directed Trust Company as of, _____ (mm/dd/yyyy) and the Loan/Asset has been paid in full. I hereby authorize Directed Trust Company to book-out the Asset listed in Section 2 above, remove it from my IRA account portfolio and sign a reconveyance letter (if provided).

5. Acknowledgement & Signature

My account is self-directed and I, alone, am responsible for the selection, due diligence, management, review, and retention of all investments in my account. I agree that Directed Trust Company (Tradename, Directed IRA), the Custodian and Administrator, is not a "fiduciary" for my account, as the term is defined in the Internal Revenue Code, ERISA or any other applicable federal, state or local laws Directed Trust Company is solely the passive, directed custodian for my account and acts only pursuant to my written instruction. I acknowledge and confirm that I have received, read and understand each of the disclosures for my account(s) and direction(s) of investment, and consent and agree to the terms and condition contained therein.

By signing below, I hereby direct Directed Trust Company, in its passive capacity, to enact this transaction for my account and hereby release, indemnify, and agree to hold harmless and defend Directed Trust Company in the event that this transaction violates any federal or state law or regulation, results in litigation, or otherwise results in disqualification, penalty, fine, or tax imposed upon me, my account, or Directed Trust Company.

➤ _____
Account Owner Signature

Date

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

[Secure File Upload](#)

Email Forms to:
Accounting@directedira.com

Send Mail to:
3033 N. Central Ave. Ste. 415
Phoenix, AZ 85012

Fax:
(602) 899-9641

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