

Property Management Agreement

Note: This form is not required if you are not using a property manager. If you are using a property management company, please remit a copy of the property management agreement document along with this form.

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. Processing cannot begin until all Investment Documents have been received and determined to be in good order.

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. Property Information

Street Address: _____

City: _____ State: _____ Zip: _____

3. Property Manager Information

Property Manager Company: _____

Contact Name: _____

Street Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

4. Recitals & Agreement

The Account Owner appoints Property manager to provide the services listed in this agreement and the Property Manger accepts such appointment. The Account Owner and Property Manager agree that the Property Manager is the Property Manager of the Account Owner, and not of Directed Trust Company. The Account Owner acknowledges that Directed Trust Company has not advised the Account Owner with respect to the selection of a Property Manager. The Account Owner agrees that he or she has sole responsibility, and not Directed Trust Company for the selection, retention, termination and monitoring of the Property Manager. The Account Owner and Property Manager agree that Directed Trust Company has a limited role in its capacity as Custodian of the Account and hereby agree that Directed Trust Company will not be responsible for any of the Property Manager's duties or for the enforcement of this agreement.

Account Owner hereby designates the individual or entity identified above as Property Manager for the property identified on this form. By signing below, Account Owner and Property Manager, agree to and acknowledge the following:

- The Property Manager is a third party to this transaction (i.e., not the Account Owner or renter)
- A spouse or other disqualified person, appointed as Property Manager, will not be compensated for managing the property.
- The Property Manager agrees to comply with all local, state and federal property management laws while acting as Property Manager.

- The Property Manager will send all payments received to Directed Trust Company for deposit into Account Owner's retirement account.
- The Property Manager will retain records for all parties. Records include but are not limited to: rental payment history (funds received from renters and any funds dispersed by the Property Manger to cover expenses), bank statements, and rental/lease agreements. Upon request, the Property Manager will provide a full accounting of these records to the Account Owner or Directed Trust Company.
- The Property Manager will provide notification to Directed Trust Company and Account Owner in the event of default and coordinate eviction proceedings as directed and approved by the Account Owner.
- The Property Manager will contact billing parties to ensure bills are forwarded to the address of the Property Manager.
- The Property Manager will ensure all expenses related to the property are paid according to the percentage of ownership.

Please note electronic signatures on the Direction of Investment form must include the electronic signature Certification page or Certification Stamp. If one is not included we will not be able to process the Direction of Investment Form.

➤ _____
Property Manager Signature

Date

➤ _____
Account Owner Signature

Date

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

[Secure File Upload](http://www.directedira.com/secureupload)
www.directedira.com/secureupload

Email Forms to:
Investments@directedira.com

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

Phone: (602) 899-9396
Fax: (602) 899-9641

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