



Real Choice. Real Control. Real Trust.

Date: \_\_\_\_\_

Borrower: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Lender: RealTrust IRA Alternatives, LLC FBO \_\_\_\_\_ IRA \_\_\_\_\_

RealTrust IRA Alternatives, LLC has received instructions from the above-referenced account holder "Lender" concerning his intent to lend retirement funds. As this asset is to be held in an Individual Retirement Account or Qualified Plan, the following instructions must be followed to ensure compliance with both IRS requirements and RealTrust IRA Alternatives, LLC policy. *Please initial all items in the spaces provided showing your intent to comply; sign and return; retain a copy of this letter for your files.*

\_\_\_\_\_ Vesting on the note and supporting documents shall be:  
RealTrust IRA Alternatives, LLC, a WA Limited Liability Company  
FBO \_\_\_\_\_ IRA \_\_\_\_\_ Mailing Address is P.O. Box 69 Chelan, WA 98816

\_\_\_\_\_ The original Note and original Security Agreement, properly recorded, (if applicable) are to be held by RealTrust IRA Alternatives, LLC.

\_\_\_\_\_ All payments, income, distributions and/or payoffs for the subject Note and security agreement must be sent to RealTrust.

\_\_\_\_\_ **Make checks payable to RealTrust IRA Alternatives FBO \_\_\_\_\_.**  
*Under the Internal Revenue Code, it is generally unacceptable to send funds directly to an Account Holder. Should that happen, you agree to indemnify RealTrust IRA Alternatives, LLC against all liability concerning IRS compliance.*

\_\_\_\_\_ If you have any questions concerning the Note and security agreement, such as but not limited to, payments or distributions, please contact RealTrust directly. You agree to honor all written instructions from RealTrust concerning changes in asset registration or the subject IRA account/Plan.

\_\_\_\_\_ You agree to inform RealTrust promptly of any change in address, telephone number, or financial status (such as bankruptcy filings, regulatory agency investigations or litigation).

\_\_\_\_\_ RealTrust does not generate an amortization schedule for loans, therefore, you acknowledge and agree to include a payment voucher with every loan payment, which will reflect the principal reduction amount; otherwise RealTrust will be unable to record principal balance reductions.

Acknowledged by Borrower: \_\_\_\_\_ date \_\_\_\_\_

Acknowledged by IRA Holder: \_\_\_\_\_ date \_\_\_\_\_