



Real Choice. Real Control. Real **Trust**.

## Documents Required Prior to Funding an Unsecured Note

As this asset is to be held in an Individual Retirement Account, the following instructions must be followed to ensure compliance with both I.R.S. requirements and RealTrust IRA Alternatives, LLC policy. These instructions are to efficiently complete your transaction. Any delays or incomplete documentation may result in a delay of funding or closing.

### Documents Required Prior to Funding:

- RealTrust client to sign and return Buy Direction Letter
- Acknowledgement form signed by the borrower
- Wire Transfer or check mailing Instructions
- Original signed Note

### All Vesting to Read:

RealTrust IRA Alternatives, LLC, a WA Limited Liability Co., Fbo (*Client name here*) IRA # (*client IRA/plan # here*)  
All investments will be vested using our Trust Tax ID 72-1578822 NOT the clients Social Security Number.

### EXAMPLE of Signature lines

(All documents required to be signed by the lender **MUST** be signed by IRA client as having been "Read & Approved" **PRIOR** to sending to RealTrust IRA Alternatives, LLC for signatures.)

#### **Accepted and Approved by:**

By: \_\_\_\_\_  
(*Client name here*)                      Date

RealTrust IRA Alternatives, LLC, a WA Limited Liability Company  
Fbo (*Client name here*)      IRA # (*client IRA/plan # here*)

By: \_\_\_\_\_  
Its: Authorized Signatory                      Date