



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

RealTrust IRA Alternatives, LLC requires the following documents prior to funding Real Estate Investments. As this asset is to be held in a Retirement Account, the instructional information below must be followed to ensure compliance with both I.R.S. requirements and RealTrust IRA Alternatives, LLC policy.

Account Holder to complete and sign an Asset Purchase Directive including all pertinent information regarding the purchase including contact information for the escrow company. The original form should be mailed to RealTrust along with a copy of the purchase and sale agreement (PSA).

Vesting on the PSA documents and closing documents shall name buyer as:

RealTrust IRA Alternatives, LLC, fbo (client name) IRA # (acct#)

If the IRA owns a percentage of the Real Estate the vesting should read as follows:

RealTrust IRA Alternatives, LLC, fbo (client name) IRA # (acct#)

As to an undivided ___ %.

If the PSA does not bear the correct vesting – an addendum must be prepared assigning interest in the contract. Once RealTrust receives the correctly vested PSA and BDL, RealTrust will sign the PSA and forward a copy to escrow.

All documents requiring signature shall read as follows; our client(s) must sign as “Accepted and Approved” PRIOR to RealTrust signing.

Accepted and Approved by:

By: _____
(client name) Date

RealTrust IRA Alternatives, LLC, a WA Limited Liability Co.
fbo (client name) IRA # (acct#)

By: _____
Authorized Signatory Date

Taxpayer ID #: 72-1578822

Escrow to provide the following to RealTrust prior to closing: Preliminary Title Report
Copy of signed Warranty Deed
Closing Documents & wire instructions

Escrow to provide the following to RealTrust following closing:
Final Closing Statement—Title Insurance Policy—Original Deed, properly recorded

Account Holder to provide RealTrust with a completed Periodic Payment Authorization Letter instructing RealTrust to make payments for any applicable expenses. (i.e., property taxes, insurance, HOA dues etc.)

Note: Delays in completing and/or returning the documents listed above or sending incomplete documentation may result in a delay of funding.

If you have any questions, please call the RealTrust Operations Center.

Operations Center
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