

BUY DIRECTION LETTER



INSTRUCTIONS:

Complete this form if you would like to instruct us to buy an asset from within your retirement account. You will also need to attach corresponding supporting documents if applicable. Please complete all sections of the General Asset Information, and complete section A, B, or C, depending on your asset type. You may fax or email this form to our office. Please contact our office to review all requirements for your purchase.

PERSONAL INFORMATION:

1. Account Holder Name _____ 2. Account Number _____
3. Contact Information for Closing Agent (By providing this information, you are authorizing us to speak with this person in order to coordinate your investment.)

I hereby authorize and direct the Administrator and/or custodian to BUY the following asset for my account:

4. Asset name, description or property address. (Describe the asset here. Provide the full physical address for real estate and mortgages. For other assets, please describe.)

5. Fees to be paid by:

- Deduct from Account
 Check
 Credit Card (Please attach credit card authorization.)

Fees are due at the time of transaction. If no indication is made, fees will be deducted from the cash balance.

6. Funding/Delivery Instructions:

- Wire (Please attach outgoing wire instructions.)
 Check (Please complete the below information.)

Payee: _____
Address: _____
City, State, Zip: _____

SPECIAL INSTRUCTIONS:

COMPLETE ONE OF THE FOLLOWING SECTIONS:

A. BUY REAL ESTATE ASSET Complete this section to direct the purchase of a real estate asset.

Property Description, A.P.N. #/SBL/Legal Description:

Total Contract Price (excluding closing costs): \$ _____

Percentage of Ownership: _____ %

Funding Amount: \$ _____
(The amount due to your account. This may include closing costs and deposits.)

Is the property to be mortgaged?

- Yes* No

*Name of Mortgagor: _____

