ForgeTrust

NOTE MODIFICATION AUTHORIZATION

Contact Center: (800) 248-8447 | www.ForgeTrust.com

This form is to be completed if you wish to modify the terms of a promissory note. Please make sure that all applicable sections are completed to ensure complete and timely processing.

If you believe your note to be uncollectible, please complete and submit the *Worthless Investment Notification Form* along with supporting documentation.

1. PERSONAL INFORMATION (*required field)

Should we need to contact you in regards to this request, your preferred method of contact is:

- ☐ Email
- ☐ Primary Phone

First Name*	Middle Name	Last Name*
Account Number*	Social Security Number* Last 4 Digits Only	Date of Birth* (MM/DD/YYYY)
Phone* XXX-XXX-XXXX	Email (Your personal email only)	

2. NOTE INFORMATION CURRENTLY REFLECTED

Borrower's Name			
Loan Number	Original Loan Amount	Effective Date (MM/DD/YYYY)	Maturity Date (MM/DD/YYYY)

3. BORROWER CONTACT INFORMATION

Company Name/Individual Name	Contact Person	Contact Phone XXX-XXX-XXXX	
Address	City	State/Province	Zip/Postal Code

4. NOTE EXTENSION TERMS

This section must be fully completed and signed by the Account Owner and Borrower if the note is being extended.

New Loan Amount* (If different than the Original Loan Amount)	New Maturity Date (MM/DD/YYYY)	Interest Rate %

Payment terms

- ◯ Interest & Principal due at maturity
- ◯ Periodic payments

Payment Frequency: ◯ Weekly ◯ Monthly ◯ Quarterly ◯ Annually ◯ Other: _____

Amount: _____ ◯ Interest Only ◯ Interest & Principal

*IMPORTANT: In the case of a new loan amount, a new note agreement is required to be provided with this form before we will process the request.

©2026 Forge Trust Co.

5. DEFAULT NOTE AUTHORIZATION

Complete this section if you have made multiple attempts to negotiate the terms and repayment with the borrower. At this point, you authorize Forge Trust to hold the note 'as is' while you continue to pursue a resolution. *A signature from the Borrower is not required if this authorization is provided.*

☐ Please continue to hold this investment in my account. I understand the original maturity date of the note has passed and this note will continue to be held by Forge Trust for my benefit (with all applicable fees) until future direction is provided. I am responsible for notifying Forge Trust of any changes to the status of this note. I acknowledge that I will continue to be responsible for all fees associated with holding this investment.

6. ACCOUNT OWNER & BORROWER SIGNATURE

I hereby acknowledge that I am solely responsible for the investment updates I am making. I hold harmless, protect and indemnify the Custodian and Administrator from and against any and all liabilities, losses, damages, expenses and charges that the Custodian and Administrator may sustain or might sustain resulting directly or indirectly from my investment. I further acknowledge that I am solely responsible for the success or failure of this investment. I hereby authorize the update of the asset(s) listed above for my Forge Trust Co. account.

Account Owner Signature ✕	Date (MM/DD/YYYY)
Borrower Signature ✕	Date (MM/DD/YYYY)

Please sign and submit additional documents as required.

DELIVERY INSTRUCTIONS

Email
realestateandnotes@ForgeTrust.com

Fax
(650) 769-6280

Regular mail
Forge Trust Co.
PO Box 2048
San Francisco, CA 94126

Overnight mail
Forge Trust Co.
4 Embarcadero Ctr, Floor 15
San Francisco, CA 94111

©2026 Forge Trust Co.