

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

Use this form to initiate a full or partial payoff of a note investment in your Forge IRA account.

If a signature is required for reconveyance or payoff demand, please attach it when submitting this form.

1. PERSONAL INFORMATION (*required field)

Should Forge Trust Co. 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)	Date of Birth* (MM/DD/YYYY)
Phone* XXX-XXX-XXXX	Email* (Your personal email only)	

2. NOTE INFORMATION

Borrower's Name	Loan No.	Original Principal Amount
If secured by property, provide the address		

3. PAYOFF INFORMATION

Full Payoff	Partial Payoff : Remaining Principal Balance \$
Payment Amount	Expected Payoff Date

4. SIGNATURE

I hereby acknowledge that I am solely responsible for my payoff decision. I hold harmless, protect, and indemnify the Custodian and Administrator from and against any liabilities, losses, damages, expenses, and charges that the Custodian and Administrator may sustain resulting directly or indirectly from my investment. I acknowledge that I am solely responsible for the success or failure of this investment. I acknowledge that Forge Trust Co. may contact me for verbal confirmation of my request, which may cause delays if I cannot be reached at the phone number(s) on record. I authorize the payoff of the above asset for my Forge Trust Co. account. I understand that the cash will be deposited into my Custodial Cash Account until further instruction from me.

Account Owner Signature X	Date (MM/DD/YYYY)
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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 6850
San Mateo, CA 94403

Overnight mail
Forge Trust Co.
3050 S Delaware Street, Ste. 202
San Mateo, CA 94403