

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

Use this form to initiate a full or partial sale of a real estate asset held in your Forge IRA account.

Provide all applicable documents related to the real estate sale for review along with this form. This may include an estimated settlement statement (HUD), deed, proceeds authorization form, purchase agreement, or other documents.

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. PROPERTY INFORMATION

Property Address	APN / Lot / Block#
My Current IRA Ownership: 100%	Partial Interest of _____%

3. CLOSING DETAILS

Escrow / Title Company / Attorney Name	Contact Name	Email
Address		Phone Number
Sale Contract Price	Estimated Closing Date	

4. SIGNATURE

I hereby attest that this transaction does not create a prohibited transaction or include a disqualified person who would receive a personal benefit through the execution of this transaction. If a disqualified party provides services to this transaction, they will not receive any compensation for providing said services. I hereby acknowledge that I am solely responsible for the sale request 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 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 hereby authorize the sale of the asset listed above 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 attach applicable sale documents.

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