

Instructions: Complete this form to sell real estate in your Quest Trust Company (QTC) account. If your account will carry a seller finance note for the buyer(s), please complete an Asset Conversion/Exchange form instead.

## A Account Holder Information

<b>First &amp; Last Name:</b>	<b>Account Number:</b>
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**Account Type:**

Traditional IRA	Roth IRA	SEP IRA	Simple IRA	HSA	ESA
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## B How Would You Like to Pay Your Fees

Choose a Payment Method:      Deduct from Account      Check Enclosed      Credit Card on File  
To add, change, or update a credit card, please contact our offices.

**QTC Fees:**

\$125 Asset Purchase Fee	\$0-\$35 Postage Fee
\$95 Non-Recourse Loan Fee (if applicable)	\$0-\$30 Funding Method (Wire, ACH, or Check)
\$350 Annual Administration Fee (if applicable)	

## C Investment Details

**Asset Name/Description:**

## D Payoff Information

### Complete Sale of Asset

I acknowledge that QTC will remove this asset from my account when funds are received.

<b>Contract/Sales Price:</b>	<b>Expected Closing Date:</b>
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**The buyer is a:**      Individual, Name: \_\_\_\_\_  
Entity, Managing Member Name: \_\_\_\_\_

### Partial Sale of Asset

I acknowledge that QTC will not remove this asset but adjust the value once funds are received.

<b>Contract/Sales Price:</b>	<b>Expected Closing Date:</b>
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<b>New Asset Value:</b>	<b>Has your percentage of ownership changed:</b> No                      Yes, ownership is _____%
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**The buyer is a:**      Individual, Name: \_\_\_\_\_  
Entity, Managing Member Name: \_\_\_\_\_

### Assignment of Asset

I acknowledge that QTC will remove the asset from my account when funds are received.

<b>Approximate Assignment Fee:</b>	<b>Expected Closing Date:</b>
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The buyer is a: Individual, Name: \_\_\_\_\_  
Entity, Managing Member Name: \_\_\_\_\_

## E Document Acknowledgement

Escrow/Title Company/Attorney Name:	Contact Name:
Phone Number:	Email Address:

## F Document Acknowledgement

**E-Sign Service Option (Available only if closing with a Title Company)** QTC has an authorized e-sign service (Adobe-Sign) that is preferred for funding. However, account holder may opt out of using the service if closing with a title company.

I opt out of using QTC's authorized e-sign service and authorize QTC to accept the signatures provided by the title company for funding. I understand that QTC will only accept e-sign signatures if transaction is closing with a title company. QTC reserves the right to require additional acknowledgment.

## G Prohibited Transactions & Disqualified People

A prohibited transaction under the Internal Revenue Code (IRC) is a transaction prohibited by law between a retirement account and the IRA owner, his or her beneficiary, or any disqualified person. IRC Section 4975 (c) and (e) lists the prohibited transactions and disqualified persons. Disqualified persons include the IRA owner's fiduciary and members of his or her family (spouse, ancestor, lineal descendant, and any spouse of a lineal descendant). If a prohibited transaction occurs, the effect is that the account is treated as distributed at its fair market values on the first day of the year.

1. Do any of the above mentioned individuals currently own, either personally or through an entity, any percentage of the real estate involved in this transaction?      Yes      No
2. Will any disqualified people receive a personal gain or benefit from this purchase? Example: Commission from sale.      Yes      No

If yes to any of the above, please explain:

## H Authorization

I confirm that I am directing Quest Trust Company (QTC), the Custodian, to complete the transaction above. I understand that my account is self-directed, and I take complete responsibility for any action taken in reliance of this Direction of Sale form to eliminate or reduce partially the value of the asset as specified above. I acknowledge that the Custodian has not provided or assumed responsibility for any tax, legal or investment advice with respect to this payoff or disposition of asset transaction, and I agree that they will not be liable for any loss sustained by me or my account which results from my instruction to eliminate or reduce the value of the asset as contemplated by this Direction of Sale.

I understand that in processing this transaction the Custodian is only acting as my agent, and nothing will be construed as conferring fiduciary status on the Custodian. I agree to indemnify and hold harmless the Custodian from any and all claims, damages, liability, actions, costs, expenses (including reasonable attorneys' fees) and any

loss to me or my account as a result of any action taken in connection with this transaction, including, without limitation, claims, damages, liability, actions and losses asserted by me.

I understand that all communication regarding this transaction must be in writing and must be signed by me or by my authorized agent on my behalf, and that no oral modification of my instructions will be valid. I understand that if this Direction of Sale and any accompanying documents are not received as required, or, if received, are unclear in the opinion of the Custodian, the Custodian may not process this transaction until proper documentation and/or clarification is received, and the Custodian will have no liability for loss of income or value.

I understand that the Custodian is not required to complete, file, or advise on any forms or requirements per the Corporate Transparency Act. I understand that I am solely responsible for conducting my due diligence and evaluating the necessity for such reporting. I understand that the Custodian does not bear or assume any responsibility to notify me of filing requirements or deadlines. I understand that the Custodian is not responsible for the accuracy and completeness of the information I provide in the CTA forms.

I understand that my account is subject to the provisions of Internal Revenue Code (IRC) §4975, which defines certain prohibited transactions. I acknowledge that the Custodian has made or will not make any determination as to whether this transaction is prohibited under §4975 or under any other federal, state or local law. I certify that this transaction will not constitute a prohibited transaction and that it complies with all applicable federal, state, and local laws, regulations and requirements.

I understand that no person at the office of the Custodian has the authority to modify any of the foregoing provisions. I certify that I have examined this Direction of Sale form and any accompanying documents or information, and to the best of my knowledge and belief, it is all true, correct and complete. I understand that no person at the office of the Custodian has the authority to modify any of the foregoing provisions. I certify that I have examined this Direction of Sale and any accompanying documents or information, and to the best of my knowledge and belief, it is all true, correct and complete.

Prepared By:

Account Holder

Limited Power of Attorney

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date