

When to use this form:

Please use this form to confirm the sale of:

- **Real Estate**
- **Notes**
- **Other Assets**

To complete your Directive:

Mail the following to CamaPlan in single package:

1. THIS FORM, SIGNED AND COMPLETED

2. IN ADDITION TO THIS FORM, PLEASE SEND US:

For Real Estate Sale:

- Agreement of Sale
- Final HUD
- Deed
- Affidavit
- Seller's Disclosure

*Initial and mark each document "read and approved" and fax or email to CamaPlan for final signatures.

For Note Sale:

- Satisfaction Letter - the note / mortgage satisfaction letter signed by the borrower and you, the client (if applicable)

NOTE: These documents are needed to efficiently complete your transaction. Incomplete documentation can result in the

application of hourly charges and/or a delay in the transaction. Any exceptions need to be documented and must be approved in writing by the Administrator.

- All documents should be titled **CAMA SDIRA LLC FBO [YOUR NAME] IRA.**
- Documents listed above must be received at least 48 hours prior to closing.
- Proceeds from the sale of an asset will not be applied to your account until this form has been received.
- Provide CamaPlan's wiring instructions to your buyer so they know where to send the funds. If your buyer is sending a check, please advise them to make the check out as follows: **CAMA SDIRA LLC FBO [YOUR NAME] IRA.**

CamaPlan Fax:
(973) 302-8622

Mail your Directive Packet to:

CamaPlan
122 E. Butler Ave, Suite 100
Ambler, PA 19002

What's next?

If you have any questions, please contact our office.

Operations@CamaPlan.com
(866) 559-4430



1. Participant Details

Legal Name

Account Number

Investment Information (Continued)

Sale Price \$

Price per Share \$

No. of Shares

2. Investment Information

Asset Description

Closing Agent/Purchaser Contact Information

Contact

Phone #

Email

3. Special Instructions

Please enter any additional instructions or information:

This sale is for:

A. Real Estate

Partial Sale

Complete Sale

Sale Price \$

Will there be seller financing?

Yes

No

B. Notes

All payments have been received and the note is satisfied

Partial payoff

C. Other Assets

Partial Sale

Complete Sale

4. Signature of Participant

By signing below, I hereby acknowledge having been advised by Administrator to seek the advice of independent legal, tax and/or investment counsel prior to executing this Directive. I further acknowledge that neither Administrator nor Custodian hereunder offer legal, tax or investment advice with respect to the subject matter hereof and it is incumbent upon me to obtain such advice from qualified third parties prior to initiating the instant directive. I understand and agree that I have the sole responsibility for the investment of the assets contained within the account established hereunder and compliance with the legal requirements pertinent thereto. I further acknowledge that Administrator's and/or Custodian's only responsibility under this Agreement, or otherwise, is to follow my appropriate written instructions (upon

forms supplied by Administrator) and that Administrator and/or Custodian are not fiduciaries hereunder and will not determine the suitability of such investment or its compliance with applicable law. I understand and acknowledge that it is my responsibility to determine whether any activity undertaken within the subject account may constitute a Prohibited Transaction pursuant to IRC §4975 and/or may give rise to any tax consequences (e.g.- Unrelated Business Taxable Income, etc.). I hereby release, indemnify and hold Administrator and Custodian harmless from any and all liability of any nature whatsoever that may arise as a consequence of Administrator and/or Custodian carrying-out the directives I am providing hereunder.

IRA Participant's Signature

Date