

Use this checklist for the sale of an asset held in your CamaPlan account.

Asset Type	Documents/ Forms	Client Responsibility
Real Estate Sale	<u>CamaPlan Forms:</u> <ul style="list-style-type: none"> • Deposit Form <u>Client Supplied Documents:</u> <ul style="list-style-type: none"> • Agreement of Sale • Final HUD • Deed • Affidavit • Seller's Disclosure 	<p>Completed and signed by client</p> <p>Initial and mark each document "Read and approved" Fax or email to CamaPlan for final signatures</p>
Note Sale	<u>CamaPlan Forms:</u> <ul style="list-style-type: none"> • Deposit Form <u>Client Supplied Documents:</u> If secured by recorded mortgage: <ul style="list-style-type: none"> • Payoff Letter and Satisfaction Piece* 	<p>Completed and signed by client.</p> <p>Fax, email or mail the letter signed by both borrower and account holder</p> <p>*CamaPlan does not draft these documents - you are required to provide these documents</p>
Private Placement/ Other	<u>CamaPlan Forms:</u> <ul style="list-style-type: none"> • Deposit Form <u>Client Supplied Documents:</u> Any relevant documents that require signatures	<p>Completed and signed by client</p>

Additional Information

- All documents should be titled: CamaPlan Administrator FBO (client name or account #) 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 a deposit form is received
- Provide your buyer with CamaPlan wire instructions, or have the buyer write a check as follows: **CamaPlan Administrator FBO client name IRA**
- These documents are needed to efficiently complete your transaction. Incomplete documentation can result in the application of hourly charges and/or a delay in your transaction. Any exceptions need to be documented and must be approved in writing by the Administrator. If you have any questions regarding these documents, **please contact our office at 866-559-4430 or email us at operations@camaplan.com**