



# Earnest Money Deposit Authorization

## Form Submission Instructions: (Choose One)

Option 1: **SERVICENOW**, e-sign and submit forms securely to STRATA. Use this option for faster form submission.

Go to <https://www.stratatrust.com/resource-center/forms/> for form access and instructions.

Option 2: You may print + email, fax, or mail the form as shown below:

Email: NewInvestments@StrataTrust.com  
 Fax: 512.495.9554  
 US Mail: PO Box 23149, Waco, TX 76702  
 Overnight: 7901 Woodway Drive, Waco, TX 76712

### Section 1 Account Information

Accountholder Name

IRA Account #  
(if known)

Social Security Number  
(Last 4 Digits Only)

Daytime Phone Number

Email Address

### Section 2 Property Information

Include the property address or description listed on the contract.

Property Address \_\_\_\_\_

Earnest Money Amount

\$ \_\_\_\_\_

Memo/Reference \_\_\_\_\_

% Undivided Interest for portion being acquired by your IRA \_\_\_\_\_%

### Section 3 Earnest Money Deposit and Fees

I authorize and instruct STRATA Trust Company to process the earnest money deposit in the manner indicated below.

If payment will be sent by bank wire or overnight delivery, be sure to include the related fees when requesting a transfer or other transaction to cover this deposit. Otherwise, your deposit may be delayed.

<input type="checkbox"/> <b>Send Payment by Check</b> Check payment will be sent by first-class U.S. Mail unless otherwise directed.				
Make Check Payable To				
Send To	Address			
	City	State	Zip	
Send By	<input type="checkbox"/> U.S Mail <input type="checkbox"/> Overnight – See IRA Fee Schedule for applicable fees			
Overnight Fee	<input type="checkbox"/> If check sent overnight	<input type="checkbox"/> Payment enclosed	<input type="checkbox"/> Deduct from my IRA account	<input type="checkbox"/> Bill FedEx/UPS acct # _____

<input type="checkbox"/> <b>Send Payment by Wire</b> See IRA Fee Schedule for applicable fees		
Bank Name		Bank Phone
Bank Location	City	State
ABA Routing #	<b>Must be 9 digits</b>	
For Credit To	Account Name	Account #
For Further Credit To	Account Name	Account #
Wire Fee	<input type="checkbox"/> Payment enclosed	<input type="checkbox"/> Deduct from my IRA account

## Section 4 Option Fee (if applicable)

I authorize and instruct STRATA Trust Company to process the Option Fee of \$ \_\_\_\_\_ in the manner indicated below.

If payment will be sent by bank wire or overnight delivery, be sure to include the related fees when requesting a transfer or other transaction to cover this deposit. Otherwise, your deposit may be delayed.

<input type="checkbox"/> <b>Send Payment by Check</b> Check payment will be sent by first-class U.S. Mail unless otherwise directed.			
Make Check Payable To			
Send To	Address		
	City	State	Zip
Send By	<input type="checkbox"/> U.S Mail	<input type="checkbox"/> Overnight – See IRA Fee Schedule for applicable fees	
Overnight Fee	If check sent overnight	<input type="checkbox"/> Payment enclosed	<input type="checkbox"/> Deduct from my IRA account <input type="checkbox"/> Bill FedEx/UPS acct # _____

<input type="checkbox"/> <b>Send Payment by Wire</b> See IRA Fee Schedule for applicable fees		
Bank Name		Bank Phone
Bank Location	City	State
ABA Routing #	<b>Must be 9 digits</b>	
For Credit To	Account Name	Account #
For Further Credit To	Account Name	Account #
Wire Fee	<input type="checkbox"/> Payment enclosed	<input type="checkbox"/> Deduct from my IRA account

## Section 5 Send Purchase Contract

I instruct STRATA to mail a copy of the fully-executed purchase contract to the Title Company/Closing Agent listed below.

Company Name	Contact Name
Address	Email
Phone	Fax

I direct STRATA Trust Company ("STRATA") to process the above-referenced earnest money deposit ("Deposit") for the benefit of my self directed IRA account ("Account"). In directing the Deposit payment, I acknowledge that 1) I have read the Investment Checklist for Real Estate and agree that the final closing for the property will not be processed from my Account until I have provided STRATA with the documentation outlined on the Checklist in good order and 2) I understand all costs (earnest money, funds for closing, expenses, etc.) related to the property must be paid directly by my Account and not out of pocket by me or any disqualified person. I agree to hold STRATA harmless from any liability for any loss, damage, injury or expense which may occur as a result of the execution of this Deposit payment. I understand that STRATA will have a reasonable amount of time to complete my instructions.

\_\_\_\_\_  
Accountholder Signature\_\_\_\_\_  
Date\_\_\_\_\_  
Date**Next Steps?**

- The Accountholder must sign the purchase contract as "Read and Approved", and STRATA will sign in its capacity as the IRA custodian.
- The named buyer on the purchase contract should be: STRATA Trust Company Custodian FBO (Accountholder Name) IRA (Account #). If the IRA will only purchase a portion of the property, include the undivided interest after the Account #.
- Attach a copy of the purchase contract.
- Submit this form and the purchase contract to STRATA as shown at the top of this form.