

Please gather all the information on this checklist and submit the documentation to STRATA Trust Company (STRATA) to sell directly-owned Real Estate in your IRA.

## Form Submission Instructions:

STRATA offers two convenient options for transmitting your requests:

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: [Operations@StrataTrust.com](mailto:Operations@StrataTrust.com)  
Fax: 512.495.9554  
US Mail: PO Box 23149, Waco, TX 76702  
Overnight: 7901 Woodway Drive, Waco, TX 76712

## Checklist

- **Direction to Sell Form:** Complete and sign STRATA's Direction to Sell form.
- **Purchase Contract:** When your IRA sells real estate, the seller on the purchase contract must be STRATA Trust Company Custodian FBO (Accountholder Name) IRA (Account #). You will sign the contract as the Accountholder, and STRATA will sign in its capacity as the IRA Custodian.
- **Closing Documents / Settlement Statement:** You will sign all of the closing documents as "Read and Approved", and then STRATA will sign in its capacity as the IRA Custodian. Please provide any overnight and/or fax instructions for STRATA to deliver the closing documents to the title company/closing attorney. You may also include a pre-paid FedEx or UPS label.
- **Deed:** The title company/closing attorney should also draft a deed for signature with STRATA Trust Company, Custodian FBO (Accountholder Name) IRA (Account #) as the grantor.
- **Deposit of Sales Proceeds:** Your IRA must receive all sales proceeds after the closing. The title company/closing attorney should send the funds to STRATA Trust Company as outlined on the STRATA Deposit Certification.

## Important Reminders

- All sales proceeds must be deposited into your IRA. If your IRA does not own 100% of the property, only your IRA's portion of the sales proceeds can be deposited to your account. The title company/closing attorney cannot send funds directly to you.
- Any final property repairs or improvements must be paid directly to an unrelated third-party from your IRA account rather than by you personally. You cannot pay for expenses out of pocket or charge expenses to a credit card and then request to be reimbursed by your IRA. STRATA's Expense Payment Authorization Form is available to download from our website. Please provide STRATA with this form along with a copy of the expense invoice to direct STRATA to pay expenses from available cash in your IRA. Please be sure all invoices contain the applicable property address.
- Please refer to STRATA's IRA Fee Schedule for any fees associated with selling real estate within your IRA (processing fees, overnight fees, etc.). As your IRA custodian, STRATA will hold the original recorded deed and the title policy in safekeeping. Please ensure that you or your property manager mails this documentation to STRATA as soon as possible after the closing.
- All scheduled expense payments for the property being sold will be automatically discontinued. No further action will be required.

### Need Assistance?

Client Services

866.928.9394 | [Service@StrataTrust.com](mailto:Service@StrataTrust.com)

Monday – Friday, 8:00 am – 5:30 pm CST

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### Section 1 Account Information

Accountholder Name		IRA Account # (if known)
Social Security Number (Last 4 Digits Only)	Daytime Phone Number	Email Address

### Section 2 Real Estate Property Information

- Property Information**  
 Property Address \_\_\_\_\_  
  
 Contract Price \$ \_\_\_\_\_  
  
 Property Ownership (Select One Only)
  My IRA owns 100% of the Property.
  My IRA owns an Undivided Interest of \_\_\_\_\_%.
- Type of Sale (Select One Only)**  
 Full Sale  
 Partial Sale  
 \*\*My IRA is only selling a portion of the property.
 

\*\*For a partial sale, please include a description of the property being sold (lot number, parcel number, acreage, etc.). You must also provide an updated Real Estate Valuation form in order to update the value of the remaining property.
- Title Company/ Closing Agent**  
 This is where STRATA should send the executed closing documents:  
 Company Name \_\_\_\_\_ Contact Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 Phone \_\_\_\_\_ Email \_\_\_\_\_
- Closing Documents Deliver**  
 Attach any closing documents which will require our signature. You will need to sign all of the documents as "Read and Approved".
 

<input type="checkbox"/> U.S. Mail	<input type="checkbox"/> Fax to _____	<input type="checkbox"/> Overnight (see IRA Fee Schedule)
<input type="checkbox"/> Charge Credit Card on file	<input type="checkbox"/> Bill FedEx/UPS acct # (see IRA Fee Schedule) _____	<input type="checkbox"/> One Time Credit Card Charge (Attach Credit Card Authorization form)
<input type="checkbox"/> Payment enclosed	<input type="checkbox"/> Deduct from my account	

### Section 3 Accountholder Signature

I direct STRATA Trust Company (STRATA) to execute the sale of the above-referenced property for the benefit of my self directed IRA account ("Account"). I understand I must sign the closing documents as "Read and Approved" before STRATA will sign as the IRA custodian. I represent that my Account is not selling the property to a disqualified entity (as defined in IRC Section 4975), and all proceeds of the property sale will be deposited to my STRATA Account. 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 Direction to Sell.



Signature of Account Holder \_\_\_\_\_

Date \_\_\_\_\_