

Looking for an easier, faster way to submit paperwork? Try the **SERVICENOW** option at www.StrataTrust.com/Forms

- ◆ E-sign and transmit directly to STRATA
- ◆ Safely upload supporting documentation
- ◆ Securely transfer data with SFTP file protocol

Use this form to request the removal of an uncollectable note held within your self-directed individual retirement account (IRA). The form should only be used when you have exhausted all efforts to pursue collection from the borrower. Please provide supporting documentation of your efforts, or the form will be returned to you for additional information. Once the note is removed from your IRA, any original documentation will be imaged and destroyed unless you specifically request the documentation to be returned to your address of record.

SECTION 1 ACCOUNT INFORMATION

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

SECTION 2 LOAN INFORMATION

Borrower Name	Asset ID Reference
Original Note Amount	Current Note Balance

SECTION 3 REASON FOR NOTE REMOVAL – MUST ATTACH SUPPORTING DOCUMENTATION

- The borrower filed bankruptcy (provide bankruptcy filing)
- The borrowing entity is out of business (provide secretary of state filings)
- The borrower is deceased (provide a death certificate)
- Financial hardship (borrower must provide a signed letter)
- Other (provide reason and documentation):

SECTION 4 ACCOUNTHOLDER SIGNATURE

I certify that I am the owner of the above-referenced account and that, in that capacity, I have exhausted all efforts to collect the amount due from the borrower. If I ever receive any funds from the borrower, I will report any amount to STRATA Trust Company and the IRS. I further certify that the information contained herein is true and accurate to the best of my knowledge.



Accountholder Signature

Date

FORM SUBMISSION OPTIONS (Please submit using one method below)

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

Client Services 866.928.9394 | Service@StrataTrust.com | Online: www.StrataTrust.com/Service-Request