



Sell Direction Letter

For Office Use Only

Note – Indicate whether this direction letter

- is the original supersedes the direction letter sent on date: _____ /time: _____
- is the original faxed on this date _____ / time: _____ to FAX number _____

Administrator _____

The name of the company that performs record keeping and administration of your plan on behalf of custodian named in the account application.

Form Instructions

1. Please complete General Information section.
2. Locate your asset type within this document and complete that section.
3. Sign and date this form, and return the original signed copy to the IRA Resource's office.
4. Maintain a copy for your records.

General Information

1. Name (as it appears on your account application)

2. Account number

I hereby authorize and direct the administrator and/or custodian to SELL the following asset from my account:

3. Escrow/Title Co./Attorney(s) Entity(ies) responsible for closing the transaction between account and the Seller. If multiple entities, please include all names. Include contact names, phone and fax numbers.

4. Asset name and description, property address or CUSIP Describe the asset here. Provide the full physical address which appears on the current deed or tax records (if purchasing real estate, notes) or the name that the seller provides in a prospectus or offering. If stocks, bonds, or other securities, please include the CUSIP or ticker symbol.

5. Transaction fees to be paid by:

All fees due at time of transaction. If no indication is made, fees will be deducted from your uninvested cash balance, if available.

Choose One:

Your Account

Check

Credit Card Card Type: _____ Card Number: _____

Exact Name on Card: _____ Security Code: _____ Expiry Date: _____

Signature: _____

6. Special instructions

A. Sell Real Estate Asset

A1. Buyer name

A2. Buyer address

A3. Buyer telephone number

A4. Contract sales price Please state the sales price of the property. If this changes please send an addendum.



Sell Direction Letter

A5. A.P.N #/legal description Parcel number used by many tax assessors. If used, it must agree with documents which we will sign on your IRA's behalf. If needed, attach legal description.

A6. Is there a carry-back note?

NO **YES** If YES, Please complete a BUY DIRECTION LETTER For Real Estate Notes. If you are going to finance all or part of this sale with your plan funds, a "Carry-back" note is involved, in which case that note becomes a part of your portfolio.

B. Sell Asset (Except Real Estate)

| B1. Quantity | B2. Price | B3. Total sale price |
|--------------------------------------|-------------------------------|-------------------------------|
| <i>Number of shares, units, etc.</i> | <i>Price per unit of sale</i> | <i>(Quantity times price)</i> |
| | \$ | \$ |

C. Prior to sale completion, all transaction documents must be notated read and approved with your signature and date. (For example, subscription documents, real estate notes, promissory notes.)

I understand that my account is self-directed and that the Administrator or Custodian do not review the merits, legitimacy, appropriateness and/or suitability of any investment in general, including, but not limited to, any investigation and/or due diligence prior to selling any investment, or in connection with my account in particular. I acknowledge that I have not requested that the Administrator and/or Custodian provide, and the Administrator and/or Custodian have not provided, any advice with respect to the investment directive set forth in this Sell Direction Letter. I understand that it is my responsibility to conduct all due diligence, including, but not limited to, search concerning the validity of title, and all other investigation that a reasonably prudent investor would undertake prior to selling any investment. I understand that neither the Administrator nor the Custodian determine whether this investment is acceptable under the Employee Retirement Income Securities Act (ERISA), the Internal Revenue Code (IRC), or any applicable federal, state, or local laws, including securities laws. I understand that it is my responsibility to review any investments to ensure compliance with these requirements. I understand that neither the Administrator nor the Custodian is a "fiduciary" for my account and/or my investment as such terms are defined in the IRC, ERISA, and/or any applicable federal, state or local laws. I agree to release, indemnify, defend and hold the Administrator and/or Custodian harmless from any claims, including, but not limited to, actions, liabilities, losses, penalties, fines and/or claims by others, arising out of this Sell Direction Letter and/or this investment, including, but not limited to, claims that an investment is not prudent, proper, diversified or otherwise in compliance with ERISA, the IRC and/or any other applicable federal, state or local laws. In the event of claims by others related to my account and/or investment wherein Administrator and/or Custodian are named as a party, Administrator and/or Custodian shall have the full and unequivocal right at their sole discretion to select their own attorneys to represent them in such litigation and deduct from my account any amounts to pay for any costs and expenses, including, but not limited to, all attorneys' fees, and costs and internal costs (collectively "Litigation Costs"), incurred by Administrator and/or Custodian in the defense of such claims and/or litigation. If there are insufficient funds in my account to cover the Litigation Costs incurred by Administrator and/or Custodian, on demand by Administrator and/or Custodian, I will promptly reimburse Administrator and/or Custodian the outstanding balance of the Litigation Costs. If I fail to promptly reimburse the Litigation Costs, Administrator and/or Custodian shall have the full and unequivocal right to freeze my assets, liquidate my assets, and/or initiate legal action in order to obtain full reimbursement of the Litigation Costs. I also understand and agree that the Administrator and/or Custodian will not be responsible to take any action should there be any default with regard to this investment.

I am directing you to complete this transaction as specified above. I confirm that the decision to sell this asset is in accordance with the rules of my account, and I agree to hold harmless and without liability the Administrator and/or Custodian of my account under the foregoing hold harmless provision. I understand that no one at Administrator and/or Custodian has authority to agree to anything different than my foregoing understandings of Administrator's and/or Custodian's policy. If any provision of this Sell Direction Letter is found to be illegal, invalid, void or unenforceable, such provision shall be severed and such illegality or invalidity shall not affect the remaining provisions, which shall remain in full force and effect.

For purposes of this Sell-Direction Letter, the terms Administrator and Custodian include its agents, assigns, joint ventures, licensees, franchises, affiliates and/or business partners. I declare that I have examined this document, including accompanying information, and to the best of my knowledge and belief, it is true, correct and complete.

Signature: _____ **Date:** _____

Please read the disclosure above the signature line before signing and dating.