

## 1. CLIENT INFORMATION

Client Name:	New Direction Account Number:
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## 2. REAL ESTATE INFORMATION

Property Address:	City:	State:	Zip:
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## 3. DOCUMENTS REQUIRED BEFORE CLOSING (a checked box indicates the complete form is included with the closing documents)

- Buy Direction Letter (used to direct New Direction IRA to purchase the asset/property)
- Payment Authorization Letter (used to direct New Direction IRA to pay expenses for the asset/property)
- Sales Contract with all Addendums (signed as "Read and Approved")
- Amendments (note: You may sign disclosures)
- Proposed Deed (Copy) (signed as "Read and Approved")
- Escrow Instructions, Settlement Statement (signed as "Read and Approved")
- Closing Statement
- Any other closing document requiring a Buyer's signature (signed as "Read and Approved")
- Wire Instructions for Title Company (signed as "Read and Approved")
- Loan Documents, if there is a mortgage (signed as "Read and Approved", if applicable)
- Hazard Insurance Application (signed as "Read and Approved", if applicable)
- Title Insurance Commitment (signed as "Read and Approved", if applicable)

## 4. DOCUMENTS REQUIRED AFTER CLOSING (a checked box indicates the IRA holder will return the form to New Direction IRA)

- Closing Statement
- Original Deed (properly recorded)
- Title Insurance Policy (if applicable)
- Hazard Insurance Policy (if applicable)
- Property Management Agreement (signed as "Read and Approved", if applicable)
- Lease/Rental Agreement (signed as "Read and Approved", if applicable)
- Property Management Acknowledgement Letter (completed by property manager)
- For Notes/Mortgage: (Payment coupon booklet, or a statement showing loan number, date of 1st payment, payment amount, where payments are to be sent, additional instructions (e.g. additional principal payments)).