



Deed of Trust / Mortgage Note Payoff Authorization

IMPORTANT INFORMATION

Use this form to initiate and authorize a deed of trust/mortgage payoff. Please ensure that each document requiring initials and signatures is signed "Read & Approved" by the client.

NOTE: Sending original documents to our office may result in delayed processing. Copies of the following documents should be submitted to Pacific Premier Trust for review via email or upload with this form:

- Payoff Demand (Any questionnaires must be completed in full by the client.)
Preliminary Reconveyance or Release

* Indicates required information.

1. ACCOUNT OWNER INFORMATION

ACCOUNT OWNER NAME (FIRST, MI, LAST)*
PACIFIC PREMIER TRUST ACCOUNT NO.
EMAIL ADDRESS
PHONE NO.*

2. LOAN INFORMATION

BORROWER NAME/COLLATERAL PROPERTY ADDRESS/LOAN NO.*
PERCENTAGE OF OWNERSHIP*
PACIFIC PREMIER TRUST ASSET ID

3. PAYOFF INFORMATION

Closing Date, if applicable ____/____/____

This is a:

- Full Payoff in the amount of \$ _____ (estimated IRA proceeds)
Partial Payoff in the amount of \$ _____ (estimated IRA proceeds)

If a Partial Payoff, please indicate the lot/parcel/address being paid off _____



4. DIRECTIONS FOR RETURNING EXECUTED DOCUMENTS

COMPANY NAME*		CONTACT NAME*	
ADDRESS*		PHONE NO.*	
CITY*	STATE*	POSTAL CODE*	

Please send documents via (check all that apply):

NOTE: If no option is selected the default will be to overnight at the client's expense. Please refer to the fee schedule for details.

Email: _____ Fax: _____

Regular Mail to address above

Express Mail Delivery to address above and:

- Charge my Pacific Premier Trust account for overnight fee:
- Use a 3rd party's billing account no. _____ Fed Ex UPS Other: _____
- Use the enclosed prepaid UPS/Fed Ex Label

5. ACKNOWLEDGMENTS & SIGNATURE

I understand that it is my responsibility to perform proper due diligence with respect to the deed of trust/mortgage note payoff, and I hereby represent to Pacific Premier Trust that I understand the risks (including any tax consequences) involved with handling the closing of my transaction. Additionally, I have consulted with my attorney or tax adviser, or I declined the opportunity to consult with my attorney or tax adviser after having the opportunity to do so.

I understand that I am responsible for ensuring that any documents relating to this transaction are signed, recorded, genuine, and legally enforceable. I acknowledge that Pacific Premier Trust has not evaluated or performed any due diligence on my behalf with respect to this transaction and that any operational review completed by Pacific Premier Trust is solely for bookkeeping purposes.

If the Account is subject to the requirements of Section 4975 of the Internal Revenue Code, I represent that the neither the Account's investment in or management of the deed of trust/mortgage nor the Account's payoff of the deed of trust/mortgage is a nonexempt prohibited transaction, under Section 4975 of the Internal Revenue Code or, if applicable, Section 406 of the Employee Retirement Income Security Act. I acknowledge that Pacific Premier Trust has not provided any advice with respect to the investment or the payoff of the deed of trust/mortgage, and I am solely responsible for determining whether the Account's investment in or management of the deed of trust/mortgage and the payoff of the deed of trust/mortgage constitutes a prohibited transaction.

I understand that Pacific Premier Trust does not render any legal or tax advice. I understand that Pacific Premier Trust has made no evaluations as to the merits of this investment and its related transactions, and I agree to release, indemnify, defend, and hold harmless Pacific Premier Trust, its employees, agents, subsidiaries, affiliates, and Successors, from any liability, costs, claims, damages, and expenses (including reasonable attorneys' fees and costs) arising from this investment.

I understand that my Account may have liability above and beyond the amount of this investment. I understand that Pacific Premier Trust shall have no duty to initiate or defend any litigation or administrative proceeding with respect to my Account or this property. I agree to pay any expenses and costs that are incurred by Pacific Premier Trust as a result of any errors or litigation including, but not limited to, costs of staff time, costs of document production, and expenses or costs incurred by outside counsel.

	ACCOUNT OWNER SIGNATURE*	DATE*
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Pacific Premier Trust performs the duties of an independent custodian of assets for self-directed individual and business retirement accounts and does not provide investment advice, sell investments or offer any tax or legal advice. Clients or potential clients are advised to perform their own due diligence in choosing any investment opportunity as well as selecting any professional to assist them with an investment opportunity.

NON-DEPOSIT INVESTMENT PRODUCTS ARE NOT INSURED BY THE FDIC; ARE NOT DEPOSITS OR OTHER OBLIGATIONS OF, OR GUARANTEED BY, THE BANK OR ANY OF ITS DIVISIONS; AND ARE SUBJECT TO INVESTMENT RISKS, INCLUDING POSSIBLE LOSS OF THE PRINCIPAL AMOUNT INVESTED.

Upload forms to:
PacificPremierTrust.com/upload
Fax to: 303-614-7036

Send mail to:
Pacific Premier Trust
Processing Center
P.O. BOX 981012
Boston, MA 02298

For express deliveries:
FIS – Remittance Processing
Loading Dock #2
Attn: Pacific Premier Trust
10 Dan Road
Canton, MA 02021

Questions?
Call 800-962-4238

