



# Solo(k) Real Estate Sale

**NOTE:** Each page of every document that requires Pacific Premier Trust's initials/signature must be signed by the client as "Read & Approved."

**Please provide the following for Pacific Premier Trust's Review & Signatures:**

Estimated HUD or Sale Settlement Statement

Proposed Conveyance Deed

Additional Escrow/Closing Documents, if applicable. Any questionnaires must be completed in their entirety by the client.

If you are doing a seller carryback and financing the purchase of the buyer please complete our Solo(k) Deed of Trust/Mortgage/Secured Note Investment Authorization form and include all applicable items for our review.

### 1 ACCOUNT OWNER INFORMATION

ACCOUNT OWNER NAME (FIRST, MI, LAST)		PACIFIC PREMIER TRUST ACCOUNT NO.
PHONE NO.	PERCENTAGE OF OWNERSHIP %	EMAIL ADDRESS

If held across multiple Solo(k) accounts:

PACIFIC PREMIER TRUST ACCOUNT NUMBER	PERCENT OF OWNERSHIP %
PACIFIC PREMIER TRUST ACCOUNT NUMBER	PERCENT OF OWNERSHIP %
PACIFIC PREMIER TRUST ACCOUNT NUMBER	PERCENT OF OWNERSHIP %

### 2 PROPERTY INFORMATION

STREET ADDRESS		
PACIFIC PREMIER TRUST ASSET ID (IF KNOWN)	PERCENTAGE OF OWNERSHIP %	PROPERTY PARCEL NUMBER OR APN

### 3 SALE INFORMATION

Closing Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Full Sale in the amount of \$ \_\_\_\_\_ (estimated Solo(k) proceeds)

Partial Sale in the amount of \$ \_\_\_\_\_ (estimated Solo(k) proceeds)

If Partial Sale, indicate the lot/parcel/address being sold: \_\_\_\_\_

Buyer's Agent Name: \_\_\_\_\_ Seller's Agent Name: \_\_\_\_\_



**4 DIRECTIONS FOR RETURNING EXECUTED DOCUMENTS**

Please send documents via (check all that apply)\*:

Email: \_\_\_\_\_

Fax: \_\_\_\_\_

Regular mail to address above

Express mail delivery to address above, and:

Charge my Pacific Premier Trust account for an overnight fee

Use a Third Party's Billing Account No.: \_\_\_\_\_

FedEx

UPS

Other: \_\_\_\_\_

Use the enclosed prepaid UPS/FedEx Label

*\*If no option is selected, the default will be to overnight at the client's expense. Please refer to your fee schedule for details.*

**5 ACCOUNT OWNER SIGNATURE**

I have initialed and/or signed where appropriate, for each document Pacific Premier Trust needs to initial/sign. I acknowledge that if there is an amendment or any subsequent documents submitted separate from this form for this transaction, I will need to sign the applicable pages as "Read & Approved" before Pacific Premier Trust will execute.

 ACCOUNT OWNER SIGNATURE	DATE (REQUIRED)
--	-----------------

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:**

[www.PacificPremierTrust.com/upload](http://www.PacificPremierTrust.com/upload)

Fax to: 303.614.7038

**Send mail to:**

Pacific Premier Trust  
Processing Center  
PO 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

