



**QUEST TRUST**  
C O M P A N Y

# Direction of Sale General

**Quest Trust Company**  
17171 Park Row, Suite 100  
Houston, TX 77084  
P: 800.320.5950  
F: 281.646.9701  
Documents@QuestTrust.com

## A. ACCOUNT HOLDER INFORMATION

Legal Name:

Account Number:

Account Type:

Traditional IRA

Roth IRA

SEP IRA

SIMPLE IRA

HSA

ESA

## B. HOW WOULD YOU LIKE TO PAY YOUR FEES?

Fees Due:

\$125.00 Transaction Fee

\$35.00 Overnight Mail (if applicable)

Choose A Payment Method:

Deduct From Account

Check Enclosed

Credit Card on File

To add, change, or update a credit card, please contact our office.

## C. ASSET SALE INFORMATION

Asset Name/Description:

Name of Buyer (if entity, include managing member):

**Complete Sale of Asset** I acknowledge that Quest Trust Company will remove this asset from my account when funds are received.

Contract/Sales Price:

Expected Closing Date:

**Partial Sale of Asset** I acknowledge that Quest Trust company will not remove this asset, but adjust the value once funds are received.

Contract/Sales Price:

Expected Closing Date:

New Asset Value:

Has your percentage of Ownership changed:

No

Yes, new ownership percentage is: \_\_\_\_\_%

## D. DISQUALIFIED PERSONS (PARTIES IN INTEREST) STATEMENT

Please answer the following questions as it relates to these individuals: **you, your spouse, your children or other direct descendants or their spouses, or your parents or other direct ascendants.**

1. Do any of the above mentioned individuals currently own, either personally or through an entity, any percentage of the real estate involved in this transaction?

Yes     No

2. Will any of the above mentioned individuals or any other disqualified person receive a personal gain or benefit as a result of the purchase of this real estate related purchase?

Yes     No

If yes to any of the questions above, please explain: \_\_\_\_\_  
\_\_\_\_\_

## E. AUTHORIZATION

I confirm that I am directing Quest Trust Company, the Custodian, to complete the transaction above. I understand that my account is self-directed, and I take complete responsibility for any action taken in reliance of this Direction of Sale form to eliminate or reduce partially the value of the asset as specified above. I acknowledge that the Custodian has not provided or assumed responsibility for any tax, legal or investment advice with respect to this payoff or disposition of asset transaction, and I agree that they will not be liable for any loss sustained by me or my account which results from my instruction to eliminate or reduce the value of the asset as contemplated by this Direction of Sale.

I understand that in processing this transaction the Custodian is only acting as my agent, and nothing will be construed as conferring fiduciary status on the Custodian. I agree to indemnify and hold harmless the Custodian from any and all claims, damages, liability, actions, costs, expenses (including reasonable attorneys' fees) and any loss to me or my account as a result of any action taken in connection with this transaction, including, without limitation, claims, damages, liability, actions and losses asserted by me.

I understand that all communication regarding this transaction must be in writing and must be signed by me or by my authorized agent on my behalf, and that no oral modification of my instructions will be valid. I understand that if this Direction of Sale and any accompanying documents are not received as required, or, if received, are unclear in the opinion of the Custodian, the Custodian may not process this transaction until proper documentation and/or clarification is received, and the Custodian will have no liability for loss of income or value.



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I understand that my account is subject to the provisions of Internal Revenue Code (IRC) §4975, which defines certain prohibited transactions. I acknowledge that the Custodian has made or will not make any determination as to whether this transaction is prohibited under §4975 or under any other federal, state or local law. I certify that this transaction will not constitute a prohibited transaction and that it complies with all applicable federal, state, and local laws, regulations and requirements.

I understand that no person at the office of the Custodian has the authority to modify any of the foregoing provisions. I certify that I have examined this Direction of Sale form and any accompanying documents or information, and to the best of my knowledge and belief, it is all true, correct and complete.

I understand that no person at the office of the Custodian has the authority to modify any of the foregoing provisions. I certify that I have examined this Direction of Sale and any accompanying documents or information, and to the best of my knowledge and belief, it is all true, correct and complete.

Prepared By:

Account Holder

Limited Power of Attorney

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date