



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

# Request for Payoff

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

Use this form to provide Quest Trust Company and applicable third parties information about an upcoming payoff for a promissory note in your account.

All investment documents must be titled in the following format: Quest Trust Company, Inc. FBO [Account Holder's Name] [IRA or HSA or CESA] #[Account Number]

## A. ACCOUNT HOLDER INFORMATION

|       |                 |
|-------|-----------------|
| Name: | Account Number: |
|-------|-----------------|

Account Type:

Traditional IRA       Roth IRA       SEP IRA       SIMPLE IRA       HSA       ESA

## B. ASSET INFORMATION

|                |              |
|----------------|--------------|
| Borrower Name: | Loan Amount: |
|----------------|--------------|

|                      |                               |
|----------------------|-------------------------------|
| Loan Secured? (Y/N): | If Yes, Security Description: |
|----------------------|-------------------------------|

**Note:** If you are expecting a payoff on a secured note, please send a release of lien signed "read and approved" to our Houston headquarters for execution.

## C. PAYOFF INFORMATION

|                                       |                              |
|---------------------------------------|------------------------------|
| Is there a prepayment penalty? (Y/N): | If yes, penalty description: |
|---------------------------------------|------------------------------|

|                |                                     |
|----------------|-------------------------------------|
| Payoff Amount: | Payoff Amount Valid Through (Date): |
|----------------|-------------------------------------|

|                |                              |
|----------------|------------------------------|
| Per Diem Rate: | Interest to Date of Closing: |
|----------------|------------------------------|

Penalties or Late Charges Due:

Payoff Prepared By:

## D. AUTHORIZATION

I understand that in processing this Request for Payoff Quest Trust Company, as my 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 my account as a result of any action taken in connection with this Request for Payoff or resulting from serving as the Custodian for this investment, including, without limitation, claims, damages, liability, actions and losses asserted by me.

I understand that all communication regarding this Request for payoff 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 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 Request for Payoff and any accompanying documents or information, and to the best of my knowledge and belief, it is all true, correct and complete.

### AUTHORIZED BY:

Account holder  
Limited power of attorney

|                             |             |
|-----------------------------|-------------|
| _____                       | _____       |
| <b>Signature (Required)</b> | <b>Date</b> |
| _____                       |             |
| <b>Print Name</b>           |             |