

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 Columbia Private 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)*	COLUMBIA PRIVATE TRUST ACCOUNT NO.
EMAIL ADDRESS	PHONE NO.*

2. LOAN INFORMATION

BORROWER NAME/COLLATERAL PROPERTY ADDRESS/LOAN NO.*	
PERCENTAGE OF OWNERSHIP*	COLUMBIA PRIVATE 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 Columbia Private Trust account for overnight fee:

Use a 3rd party's billing account no. _____ FedEx UPS Other: _____

Use the enclosed prepaid UPS/FedEx 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 Columbia Private 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 Columbia Private Trust has not evaluated or performed any due diligence on my behalf with respect to this transaction and that any operational review completed by Columbia Private 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 Columbia Private 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 Columbia Private Trust does not render any legal or tax advice. I understand that Columbia Private 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 Columbia Private 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 Columbia Private 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 Columbia Private 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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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:
ColumbiaPrivateTrust.com/Upload

Fax to: 303.614.7036

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

For express deliveries:
FIS-Remittance Processing
Loading Dock #2
Attn: Columbia Private Trust
10 Dan Road
Canton, MA 02021

Questions?
Call 800.962.4238

