

Solo(k) Real Estate Sale

NOTE: Each page of every document that requires Columbia Private Trust’s initials/signature must be signed by the client as “Read & Approved.”

Please provide the following for Columbia Private 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)		COLUMBIA PRIVATE TRUST ACCOUNT NO.
PHONE NO.	PERCENTAGE OF OWNERSHIP %	EMAIL ADDRESS

If held across multiple Solo(k) accounts:

COLUMBIA PRIVATE TRUST ACCOUNT NUMBER	PERCENT OF OWNERSHIP %
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2. PROPERTY INFORMATION

STREET ADDRESS		
COLUMBIA PRIVATE 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 a Partial Sale, please 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 Columbia Private 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 Columbia Private 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 Columbia Private Trust will execute.

 ACCOUNT OWNER SIGNATURE	DATE (REQUIRED)
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Upload forms to:
ColumbiaPrivateTrust.com/Upload
Fax to: 303.614.7038

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

