



## WHEN TO USE THIS FORM

This form should be used when:

- The terms of your promissory note investment are changing. This is inclusive of interest rate, payment amount, and/or frequency of payments.
- You wish to extend the maturity date of your promissory note investment.

## INSTRUCTIONS & GUIDELINES

The **Note Modification Form** MUST be signed by the account owner AND the borrower to evidence the mutual agreement to modify the terms of the loan. Send completed form by mail, fax, or e-mail to our office.

Please provide the original promissory note or promissory note modification to support the changes and for retention in our safekeeping vault.

## CONTACT INFORMATION

### PHYSICAL ADDRESS:

Equity Institutional  
Attn: Key Accounts  
1 Equity Way  
Westlake, OH 44145

### WEBSITE:

[www.EquityInstitutional.com/k](http://www.EquityInstitutional.com/k)

**For assistance, please contact a Client Service Representative at:**

### PHONE:

866-958-9054

**Or E-mail questions to:**

### E-MAIL:

[KeyAccounts@EquityInstitutional.com](mailto:KeyAccounts@EquityInstitutional.com)

## SUBMISSION OPTIONS

### OVERNIGHT:

Equity Institutional  
Attn: Key Accounts  
1 Equity Way  
Westlake, OH 44145

### REGULAR MAIL:

Equity Institutional  
Attn: Key Accounts  
P. O. Box 451159  
Westlake, OH 44145

### FAX:

440-365-1444

### BY E-MAIL:

[KeyAccounts@EquityInstitutional.com](mailto:KeyAccounts@EquityInstitutional.com)

**DO NOT FAX OR MAIL THIS COVER PAGE**

**INVESTMENT PRODUCTS: NOT FDIC INSURED - NO BANK GUARANTEE - MAY LOSE VALUE**

**1 ACCOUNT OWNER INFORMATION**

ACCOUNT OWNER NAME	ACCOUNT NUMBER
BORROWER	IRN
EMAIL ADDRESS	

**2 NEW NOTE INFORMATION**

INTEREST RATE	PAYMENT FREQUENCY
NUMBER OF PAYMENTS	PAYMENT AMOUNT
NEW PAYMENT EFFECTIVE DATE	MATURITY DATE
BALLOON PAYMENT	CURRENT VALUE

THIS SPACE INTENTIONALLY LEFT BLANK

**SIGN & DATE**\_\_\_\_\_  
Signature of Account Owner\_\_\_\_\_  
Date\_\_\_\_\_  
Signature of Borrower\_\_\_\_\_  
Date\_\_\_\_\_  
Account Number