

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 Trust Company
Attn: Institutional Accounts
1 Equity Way
Westlake, OH 44145

WEBSITE:

www.EquityInstitutional.com

For assistance, please contact a Client Service Representative at:

PHONE:

800-955-3434 (option 2)

Or e-mail questions to:

E-MAIL:

IRAServices@EquityInstitutional.com

SUBMISSION OPTIONS

OVERNIGHT:

Equity Trust Company
Attn: Institutional Accounts
1 Equity Way
Westlake, OH 44145

REGULAR MAIL:

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

FAX:

(440) 365-1444

BY E-MAIL:

IRAServices@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