



This form is to be completed if you wish to modify the terms of a promissory note.

## 1. PERSONAL INFORMATION (\*required field)

Should IRA Services need to contact you in regards to this request, your preferred method of contact is:

Email

Primary Phone

First Name*	Middle Name	Last Name*
Account Number*	Social Security Number* (last 4 digits)	Date of Birth* (MM/DD/YYYY)
Phone* XXX-XXX-XXXX	Email (Your personal email only)	

## 2. NOTE INFORMATION CURRENTLY REFLECTED

Borrower's Name			
Loan Number	Loan Amount	Loan Effective Date (MM/DD/YYYY)	Loan Maturity Date (MM/DD/YYYY)

## 3. BORROWER CONTACT INFORMATION

Company Name/Individual Name		Contact Person	
Address			
City	State/Province	Zip/Postal Code	Contact Phone XXX-XXX-XXXX

## 4. NOTE STATUS: EXTENSION TERMS (Your request will not be processed if you do not provide the required documents with this form)

This note has been extended pursuant to the following terms (this section must be fully completed):

Please make sure that all applicable sections are completed to ensure complete and timely processing.

New Maturity Date (MM/DD/YYYY)	Interest Rate	%
Payment terms		
Interest & Principal due at maturity		
Periodic payments		
Payment Frequency:	Weekly	Monthly
	Quarterly	Annually
	Other: _____	
Amount: _____	Interest Only	Interest & Principal

## 5. NOTE STATUS: UNCOLLECTABLE (Your request will not be processed if you do not provide the required documents with this form.)

Based on your note investment status, there may be several documents required to complete the update of your note investment. Your investment update request must accompany all of the required documentation outlined below in order to be processed. Please make sure that all supporting documents are completed in full and submitted at the same time with this form.

This note is uncollectable:

I have used my best efforts to collect on the note and have determined that the note is uncollectable for following reason(s):

*Please check all that apply and provide supporting documentation*

Borrower is in litigation (IMPORTANT: you must provide supporting documentation, such as bankruptcy notice, court documents, etc.)
Note is in foreclosure (IMPORTANT: you must provide foreclosure documents)
Other, explain:
I have enclosed the following documents:

## 6. ACKNOWLEDGMENT, AUTHORIZATION, PARTICIPANT & BORROWER SIGNATURE

I hereby acknowledge that I am solely responsible for the investment updates I am making. I hold harmless, protect and indemnify the Custodian and Administrator from and against any and all liabilities, losses, damages, expenses and charges that the Custodian and Administrator may sustain or might sustain resulting directly or indirectly from my investment. I further acknowledge that I am solely responsible for the success or failure of this investment. I hereby authorize the update of the asset(s) listed above for my IRA Services Trust Company account.

Participant Signature <b>X</b>	Date (MM/DD/YYYY)
Borrower Signature <b>X</b>	Date (MM/DD/YYYY)

Please sign and submit additional documents as required.

## DELIVERY INSTRUCTIONS

**Email**  
notes@IRAServices.com

**Fax**  
(650) 745-3279

**Regular mail**  
IRA Services  
PO Box 7080  
San Carlos, CA 94070-7080

**Overnight mail**  
IRA Services  
1160 Industrial Road, Unit 1  
San Carlos, CA 94070-4128