



MAILING ADDRESS
Horizon Trust Company
P.O. Box 30007
Albuquerque, New Mexico 87190

FOR OVERNIGHT NIGHT MAIL ONLY:
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CHECKLIST FOR PURCHASING REAL ESTATE IN YOUR SELF DIRECTED IRA

- 1. Notify Horizon Trust Company of intent to purchase real estate.
2. Negotiate the purchase of the real estate.
3. Make sure that the Purchaser on the purchase agreement is Horizon Trust Company, custodian for \_\_\_\_\_IRA.
4. Review the purchase agreement and if needed have your attorney and/or accountant review it. Sign below acknowledging review: \_\_\_\_\_
5. After reviewing the purchase documents contact Horizon Trust Company to sign as custodian for your IRA and disburse funds for earnest money, if needed. A Direction of Investment form will be required to instruct Horizon Trust Company to sign on behalf of your IRA. Do not sign any documents since this is an IRA purchase.
6. Deliver the purchase documents back to your realtor or title company to prepare for closing.
7. When the title company notifies you that they are ready to close your transaction, pick up the documents and review them along with your attorney and/or accountant. Sign below acknowledging your review: \_\_\_\_\_
8. After your review of the final closing documents, contact Horizon Trust Company to sign as custodian for your IRA. Do not sign any documents since this is an IRA purchase.
9. Direct the title company to send all closing documents to Horizon Trust Company with copies to you if you so desire.

Account Holder: \_\_\_\_\_

Self Directed IRA Account Number: \_\_\_\_\_

SS: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_