



CHECKLIST FOR SELLING REAL ESTATE IN YOUR SELF DIRECTED IRA

- 1. Notify Horizon Trust Company of intent to sell real estate.
2. Negotiate the sale of the real estate.
3. Make sure that the Seller 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 sale documents contact Horizon Trust Company to sign as custodian for your IRA. A Direction of Investment will be required to instruct Horizon Trust Company to sign on behalf of your IRA. Do not sign any documents since this asset is being sold from your IRA.
6. Deliver the sale 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 asset is being sold from your IRA.
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: \_\_\_\_\_