



A Division of Equity Trust Company

NOTE MODIFICATION FORM



INSTRUCTIONS AND GUIDELINES

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.

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.



SUBMISSION OPTIONS

BY FAX
254-751-0872

OVERNIGHT
Sterling Trust
1101 Wooded Acres
Suite 120
Waco, TX 76710

REGULAR MAIL
Sterling Trust
P.O. Box 2526
Waco, TX 76702-2526

BY E-MAIL
IRAServices@SterlingTrustCompany.com



CONTACT INFORMATION

MAILING ADDRESS:
Sterling Trust
P.O. Box 2526
Waco, TX 76702-2526

PHYSICAL ADDRESS:
Sterling Trust
1101 Wooded Acres
Suite 120
Waco, TX 76710

For assistance, please contact a Client Service Representative at:

Phone:
800-955-3434 (Option 2)
254-751-1505 (Option 2)

Fax:
254-751-0872

Website:
www.SterlingTrustCompany.com

Or e-mail questions to:
IRAServices@SterlingTrustCompany.com

DO NOT FAX OR MAIL THIS COVER PAGE



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NOTE MODIFICATION FORM

PLEASE PRINT CLEARLY. A DELAY IN PROCESSING MAY OCCUR IF INSTRUCTION IS UNCLEAR.

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

X _____
Signature of Account Owner Date

X _____
Signature of Borrower Date

Account Number