



SOLO(K) DEED OF TRUST/MORTGAGE NOTE PAYOFF FORM

Each page of the document that requires PENSICO Trust Company's (PENSICO's) initials/signature must be signed by the client as "Read and Approved"

Please provide the following for PENSICO's Review and Signatures:

- ☐ Prepared payoff document (Demand and Reconveyance, Satisfaction of Mortgage, etc.)
- ☐ Other documents that need to be signed by the lender/beneficiary, if applicable
- ☐ **Any questionnaires must be completed in their entirety by the client**
- ☐ All documents Signed as "Read and Approved" by the client

ACCOUNT OWNER INFORMATION

PENSICO Client Account Name: _____

Phone Number: _____ Email Address: _____

PENSICO Account Number: _____ % of ownership: _____

If held across multiple accounts:

PENSICO Account Number: _____ % of ownership: _____

PENSICO Account Number: _____ % of ownership: _____

PENSICO Account Number: _____ % of ownership: _____

LOAN INFORMATION

Borrower Name/Collateral Property Address/Loan Number: _____

Percentage of Ownership: _____%

PENSICO Asset ID (if known): _____

PAYOFF INFORMATION

☐ Closing date, if any ____/____/____

This is a:

☐ Full Payoff in the amount of \$ _____ (estimated Solo(K) proceeds)

☐ Partial Payoff in the amount of \$ _____ (estimated Solo(K) proceeds)

☐ If Partial Sale, please indicate the lot/parcel/address being sold _____

☐ Buyer's Agent Name: _____ Seller's Agent Name: _____

RETURN EXECUTED DOCUMENTS TO

Company Name: _____ Contact Name: _____

Address: _____ Phone Number: _____

Please Send via (check all that apply)*:

☐ Email: _____ ☐ Fax: _____

☐ Regular Mail to address above

☐ Express Mail Delivery to address above and:

(continued)

- ☐ Charge my PENSICO account for overnight fee
- ☐ Use a third party ☐ UPS Account # _____ OR ☐ FED EX Account # _____
- ☐ Use the enclosed prepaid UPS/FED Ex Label

***If no option is selected the default will be to overnight at the client's expense. Please refer to the fee schedule for details.**

I have initialed and/or signed where appropriate, for each document Pensco Trust Company (PENSICO) needs to initial/sign. I acknowledge that if there is an amendment or any subsequent documents submitted separate from this form for this transaction, I will need to sign the applicable pages as "Read and Approved" before PENSICO will execute.



Account Owner Signature

Date

INVESTMENT PRODUCTS: NOT FDIC INSURED • NO BANK GUARANTEE • MAY LOSE VALUE

Upload forms to:
www.pensco.com/upload

Fax to: 303-614-7036

Send mail to:
PENSICO
P.O. Box 173859
Denver, CO 80217-3859

For express deliveries:
PENSICO
1560 Broadway, Suite 400
Denver, CO 80202-3331

Questions?
Call 1-800-962-4238