

1. CLIENT INFORMATION

Client Name:	New Direction Account Number:
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2. REAL ESTATE INFORMATION

Property Address:	City:	State:	Zip:
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3. DOCUMENTS REQUIRED BEFORE CLOSING (a checked box indicates the complete form is included with the closing documents)

- Buy Direction Letter (used to direct New Direction Trust Company to purchase the asset/property)
- Payment Authorization Letter (used to direct New Direction Trust Company to pay expenses for the asset/property)
- Sales Contract with all Addendums (signed as "Read and Approved")
- Amendments (note: You may sign disclosures)
- Proposed Deed (Copy) (signed as "Read and Approved")
- Escrow Instructions, Settlement Statement (signed as "Read and Approved")
- Closing Statement
- Any other closing document requiring a Buyer's signature (signed as "Read and Approved") Wire
- Instructions for Title Company (signed as "Read and Approved")
- Loan Documents, if there is a mortgage (signed as "Read and Approved", if applicable)
- Hazard Insurance Application (signed as "Read and Approved", if applicable)
- Title Insurance Commitment (signed as "Read and Approved", if applicable)

4. DOCUMENTS REQUIRED AFTER CLOSING (a checked box indicates the IRA holder will return the form to New Direction Trust Company)

- Closing Statement
- Original Deed (properly recorded)
- Title Insurance Policy (if applicable)
- Hazard Insurance Policy (if applicable)
- Property Management Agreement (signed as "Read and Approved", if applicable)
- Lease/Rental Agreement (signed as "Read and Approved", if applicable)
- Property Management Acknowledgement Letter (completed by property manager)
- For Notes/Mortgage: (Payment coupon booklet, or a statement showing loan number, date of 1st payment, payment amount, where payments are to be sent, additional instructions (e.g. additional principal payments)).