

CLIENT

1

Submits: a) Transfer Authorization, b) Assignment of Note, c) Copy of recent account statement from current Custodian, and d) IRA to IRA LLC Transfer form (this can be sent later in the transfer process).

MTC

2

Forwards the Transfer Authorization and Assignment of Note to the client's current Custodian requesting that they forward us: a) the original Note, and b) the signed Assignment of Note.

CURRENT  
CUSTODIAN

3

Sends the Note and signed Assignment of Note to MTC.

MTC

4

Completes section F of the Assignment of Note (which further assigns the note from MTC to the client's IRA LLC), then sends a copy of the Note and the signed Assignment of Note to the client.

CLIENT

5

Sends a copy of the Note and the signed Assignment of Note to the borrower for acknowledgment.

BORROWER

6

Signs the Assignment of Note and mails it back to the client.