VANTAGE®

Note Update

Date Stamp
(Office use only)
Rev. 11/7/2021

This is a fillable PDF form. To complete the form, click in an area and type.

Account Owner Information *(As it appears on your account application)*

Legal Name: ______________________ **Vantage Account #:** ______________
First, Middle, Last

Borrower Information

Borrower's Name on Note: ______________________

Update of Note Information

To update the note held in your account at Vantage, please complete the information below and return it to our office with all applicable documentation. Should you have any questions, please do not hesitate to call our office or email us at *Info@VantageIRAs.com*

Please mark all applicable responses:

- ◯ **The Maturity Date Has Been Updated to:** ______________________
  Please submit an* ***original *signed amended or extended note*
- ◯ **The Note Amount Has Been Updated to:** ______________________
  Please submit an* ***original *signed amended or extended note*
- ◯ **The Note Has Been Paid Off in Full**
  ***Please complete and submit a "Sell Direction Letter" form*
- ◯ **The Original Note Terms Have Changed and New Terms Have Been Agreed Upon with the Borrower**
  Please submit an* ***original *signed amended or extended note*
- ◯ **The Note is In Default - Full or Partial Payment is Expected**
  ***Please attach details of the payment plan and any supporting documentation*
- ◯ **The Note is In Default - Future Payment is NOT Expected**
  ***Please complete and submit a "Worthless Asset" form*

Please Note: payments made directly to the account holder are in violation of IRS regulations and are subject to penalty.

Servicing Company Information *(Complete this section if this form is being completed by the Servicing Company)*

Contact Name: ______________________ **Company:** ______________

Email: ______________________ **Phone:** ______________

Signature: ______________________ **Date:** ______________

Signature

Account Owner's Signature: ______________________ **Date:** ______________

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