

For the Earnest Money/Deposit:

You

1



The realtor or Title Company should prepare a Purchase Contract with the buyer listed as “Madison Trust Company, Custodian FBO [Your Name & MTC Account #]”.



Submit the signed Purchase Contract and an Investment Authorization form to Madison Trust. The Investment Authorization form details the earnest money amount and the check or wiring Instructions.

MTC

2



Madison Trust will countersign the Purchase Contract as custodian of your IRA and will issue a check or wire to the escrow agent from your IRA.

For the Purchase/Closing:

You

1



You will submit the following closing documents prepared by the realtor, attorney or Title Company:

- Settlement Statement/HUD
- Draft of the Deed

The Deed must be titled “Madison Trust Company, Custodian FBO [Accountholder’s name & MTC Account #]” and should state “Record and return to Madison Administration Company, 1 Paragon Drive, Suite 275, Montvale, NJ 07645”

- Title Policy (if applicable)



You will submit an Investment Authorization form instructing Madison Trust to complete the purchase by issuing a check or wire to the closing agent.

Title Co.

2



Submits the Deed to the local County Clerk’s office for recording.

County Clerk

3



Records the Deed and returns it to Madison Trust Company for safekeeping.

[DOWNLOAD INVESTMENT AUTHORIZATION FORM](#)