

Prior to Funding:

You

1



Please prepare a Promissory Note with the following information:

- Amount of loan
- Date of issuance
- Interest Rate
- Interest Compounding Period (annual, quarterly, monthly, daily, none)
- Re-payment terms and an amortization table if applicable
- Maturity Date

The lender must be listed as “Madison Trust Company, Custodian, FBO [Accountholder’s name & MTC Account #]”.



The Promissory Note must be signed and notarized by the Borrower prior to funding.

If the Borrower is a business entity, please submit the entity’s formation documents (along with a Certificate of Good Standing if the entity has been in existence for more than 12 months).

You

2



Please provide Madison Trust with a copy of the Promissory Note along with an [Investment Authorization form](#).

MTC

3



Issues a check or wire from your IRA to the Borrower in the amount specified on your Investment Authorization.

Post-Funding:

Borrower

1



The Borrower will issue payments to your IRA via check or wire made payable to “Madison Trust Company Custodian FBO [Accountholder’s name & MTC Account #].”

GO TO INVESTMENT
AUTHORIZATION FORM