



WHEN TO USE THIS FORM

This Form should be used when:

- The terms of your promissory note investment are changing. This is inclusive of interest rate, payment amount, and/or frequency of payments.
- You wish to extend the maturity date of your promissory note investment.

INSTRUCTIONS & GUIDELINES

The form **MUST** be signed by the account owner **AND** the borrower to evidence the mutual agreement to modify the terms of the loan. Send completed form by mail, fax, or e-mail to our office.

Please provide the original promissory note or promissory note modification to support the changes and for retention in our safekeeping vault.

CONTACT INFORMATION

PHYSICAL ADDRESS:
Equity Trust Company
1 Equity Way
Westlake, OH 44145

PHONE NUMBER:
(440) 323-5491

WEBSITE:
www.trustetc.com

For assistance, please contact a member of your First Class Service Team at:

TOLL FREE:
(877) 693-8208

Or e-mail questions to:

E-MAIL:
help@trustetc.com

SUBMISSION OPTIONS

BY FAX:
(440) 366-3752

REGULAR MAIL:
Equity Trust Company
P.O. Box 451340
Westlake, OH 44145

BY E-MAIL:
help@trustetc.com

OVERNIGHT MAIL:
Equity Trust Company
1 Equity Way
Westlake, OH 44145

DO NOT FAX OR MAIL THIS COVER PAGE

INVESTMENT PRODUCTS: NOT FDIC INSURED - NO BANK GUARANTEE - MAY LOSE VALUE

1 ACCOUNT HOLDER INFORMATION

ACCOUNT HOLDER NAME		ACCOUNT NUMBER
BORROWER	IRN	

2 NEW NOTE INFORMATION

INTEREST RATE	PAYMENT FREQUENCY
NUMBER OF PAYMENTS	PAYMENT AMOUNT
NEW PAYMENT EFFECTIVE DATE	MATURITY DATE
BALLOON PAYMENT	CURRENT VALUE

THIS SPACE INTENTIONALLY LEFT BLANK

3 SIGNATURE

✕ _____ Date ✕ _____ Date
 Signature of Account Owner Signature of Borrower