

NOTE SERVICER CERTIFICATION

This form to be completed by the authorized representative assigned to service the promissory note asset.

1. ACCOUNT INFORMATION

IRA Account Owner Name	iPlanGroup Account Number
Asset Reference Number or Asset Description	

2. PROMISSORY NOTE/SERVICER INFORMATION

NOTE TYPE

Secured
 Unsecured
 Non-Recourse
 Other: _____

NOTE SERVICER INFORMATION

If you as the account holder intend to personally act as the **unpaid** note servicer of the promissory note, this section should be completed with your information.

Note Servicer or Company Name (if applicable)	Note Servicer Name (if applicable)	Note Servicer's Title		
Phone Number	Fax Number	Email Address		
State in Which Entity is Organized	Website(s)			
Company Street Address	City	State	Zip Code	

3. VALUATION INFORMATION

Please complete the information below to indicate the individual responsible for providing the annual fair market value and substantiation of value.

Name	Title/Position			
Phone	Fax	Email		
Street Address	City	State	Zip Code	

STATEMENT FREQUENCY

Annually
 Quarterly
 Monthly
 Other: _____

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4. NOTE SERVICER ACKNOWLEDGEMENT AND AGREEMENT

- Within 60 days of purchase, assignment, or re-registration of the Note, Note Servicer/Servicing Agent will provide IRA Plan Partners LLC DBA iPlanGroup (hereafter known as “iPlanGroup”) with either the original executed note and original recorded Mortgage/Deed of Trust (if applicable) or a copy of same if the original(s) are to be held by the Servicing Agent. Note Servicer further acknowledges that failure to do so may cause iPlanGroup to distribute the asset, which may result in a taxable event to the account holder.
- The Note will be correctly issued/titled in accordance with the IRA titling as described in the Promissory Note Investment Kit.
- Account holders will be provided applicable documentation as appropriate for the investment.
- Note Servicer will not use iPlanGroup’s name in advertising, printed or web-based material or any other form of communication without express written consent.
- iPlanGroup is not responsible for computing payoff iPlanGroup's balances or preparing or filing Form 1098.
- To the extent attributable to the fraud, negligence, or misconduct of the Note Servicer, Note Servicer will indemnify and hold iPlanGroup harmless from and against any and all damages, claims, losses, expenses or costs of any nature including without limitation any court costs and attorney’s fees asserted against or incurred by iPlanGroup as a result of legal actions involving the investment or the asset.
- All payments related to the asset or associated with the investment will be sent directly to iPlanGroup in accordance with the instructions listed in the Promissory Note Investment Kit in a timely manner for credit to the appropriate iPlanGroup account. Under no circumstances will the Note Servicer distribute any monies, interest or assets directly to an iPlanGroup account holder prior to an in-kind distribution of the asset to the account holder. Note Servicer is solely responsible for any tax, legal, or penalty damages and charges associated with the direct distribution of any monies, interest or assets by the Note Servicer to the account holder.
- Note Service will notify iPlanGroup if any terms of the note have changed and provide the necessary supporting document to substantiate the change. (i.e. maturity date, interest rate, payment schedule, stock conversion, etc.)
- Note Servicer understands that account holders may need to re-register or sell part of the asset to meet required minimum distribution rules.
- Note Servicer will not accept any change, assignment, re-registration, or change of registered owner address for any asset that lists iPlanGroup as administrator but does not bear an authorized signature of iPlanGroup and will notify iPlanGroup immediately upon receipt of any such documents.
- Note Servicer understands that making payments payable to the client personally may make the asset no longer administratively feasible for iPlanGroup to hold. In this event, Note Servicer agrees that upon direction from iPlanGroup the asset will be re-registered to either the account holder or to another administrator/custodian.

I, the Note Servicer of the aforementioned promissory note investment, hereby attest and agree that the information included on this form is factual and true. I agree to the terms, conditions and representations.

<i>Authorized Signature of Note Servicer</i> X		<i>Date</i>
<i>Print Name</i>	<i>Title (if applicable)</i>	