

Note Investments: Modification Agreements & How To Successfully Update Assets

Have you had recent modifications or updates to your note investments?
Here's what you need to know to successfully update your asset/s.

HOW TO SUBMIT A MODIFICATION AGREEMENT

Writing a modification agreement is simple. You can either:

1. Pick one up from your loan servicing agent
2. Download one from the Internet
3. Do it yourself by writing a simple letter of instruction

Whichever method you choose, here's the information that needs to be included:

CHECKLIST

LENDER NAME

The lender name should read "PENSICO Trust Company, FBO (Client Name)."
This should match the last document, either the original note or last modification to the note.

BORROWER NAME/S

TERMS

The interest rate and maturity date.

INVESTMENT AMOUNT

The value of your note investment.

SIGNATURES

The modification agreement must be signed by the borrowers and signed "Read & Approved"
by the client.

Have questions? We're here to help! Drop us a line at clients@pensico.com and a Client Services representative will get back to you with answers to your questions about submitting modification agreements to complete your note investment status change.

Thank you – we greatly appreciate your business!