



Please send physical forms to:
(Overnight Mail – Fed Ex, UPS, DHL, etc.) Vistra USA, LLC.
 125 E Sir Francis Drake Blvd Ste 401 Larkspur, CA 94939-1820
(Regular Mail: USPS) Vistra USA LLC. P.O. Box 2609 San Rafael CA 94912-2609
 There is no Asset Transfer Fee Required. Do not send documents to Redwood Mortgage Vistra USA, LLC (was formerly Phoenix American)
Important: If appropriate, include Trust Documents, Certificate of Death and any other relevant documentation and instructions.
 Custodial accounts need Custodial Medallion Stamp Guarantee

Asset Transfer Form

Assignor

Note: A custodial account needs a custodial MSG-in both sections.

Current Registration	Security Name Investor # _____
# of Units (\$1/Unit) to be transferred (“all” is acceptable)	Current Tax ID # (or social security number)
The assignor hereby assigns to the assignee the assignor’s right, title and interest in the asset described herein. This hereby constitutes and appoints the company to transfer the above referenced asset on the books of the company with full power of substitution in the premises.	
Signature of Assignor (or their Agent) _____ Date _____	Medallion Signature Guarantee Stamp (required) (If a custodial account, both sections need custodial MSGs)

Assignee

Note: A custodial account needs an MSG stamp in both sections

The Assignee hereby makes application to accept, subject to the managers’ rights, from the assignor all rights and interests, as set forth in the operating agreement of the company, and intends to succeed the assignor as a substitute member and agrees to accept all the terms and conditions of the operating agreement and related documents.	
New Registration	Assignee’s Address Phone # _____
Asset Classification (i.e., Individual, Trust)	Assignee’s Tax ID # (or social security number)
Signature of Assignee Acceptance _____ Date _____	Medallion Signature Guarantee Stamp (required) (If a custodial account, both sections need custodial MSGs)

If there is more than one assignee, multiple forms may be used and all new titleholders must sign. Additional documentation may be necessary to complete the re-registration of the asset. Please contact Redwood Mortgage Investors for more information. **Please direct custodians to mail to address above.**