

FAIR MARKET VALUATION FORM

This form is to be used to assign a fair market value for individual assets. This form **must be completed by a qualified, independent valuator/appraiser and submitted with supporting documentation.**

Account Information			
Name (as it appears on your account)	Account Number	Account Type (Trad., ROTH, SEP)	
Email Address		Daytime Phone Number	
Address	City	State	Zip Code

Asset Information

Please attach supporting documentation with regards to this valuation/appraisal hereto.

Asset Name/Description	
Percentage of Ownership %	Asset Type (Real Estate, LLC, Partnership, etc.)
Purchase Price of Asset \$	Current Asset Value \$
Notes:	

Third Party Valuator Information

Valuator Name	Title		
Company Name	Phone Number		
Address	City	State	Zip Code

Signatures

I certify that I am qualified to give an independent valuation/appraisal for this particular asset. I understand that this valuation/appraisal will be used for reporting purposes to the Internal Revenue Service and that any false or misleading valuation/appraisal of any assets may result in penalties and fines for both the valuator/appraiser and the account owner.

Valuator/Appraiser Signature:	Date:
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I certify that I am the owner of the above referenced account and in that capacity I have retained the services of the individual listed to prepare, present and attest to the value of the assets contained. I further certify that the information contained herein is true and accurate to the best of my knowledge.

Account Owner's Signature:	Date:
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