

## 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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