



This form is to be completed in full. You must attach your valuation document(s) to this form. A certified appraisal report is required if you are planning to take a distribution or planning to do a Roth conversion.

For your annual valuation to be reflected on the year-end statement of the current year, this form must be submitted by January 10th of the following year.

1. PERSONAL INFORMATION (*required field)

Should IRA Services need to contact you in regards to this request, your preferred method of contact is:

Email

Primary Phone

First Name*	Middle Name	Last Name*
Account Number*	Social Security Number* (last 4 digits)	Date of Birth* (MM/DD/YYYY)
Phone* XXX-XXX-XXXX	Email (Your personal email only)	

2. PROPERTY IDENTIFICATION

Parcel Number	County	State	
Property Address and/or Property Description			
City	State/Province	Zip/Postal Code	Your IRA's Percentage of Ownership %

3. VALUATION

Fair Market Value of the property listed above	As of (MM/DD/YYYY)
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I have attached the following valuation document:

Note: A certified appraisal report submitted by you or any other owner of the property (if there are multiple owners) will supersede any other valuation provided.

Most recent tax assessment notice or tax bill, if such assessment represents the fair market value EXCEPTION you have a Required Minimum Distribution because you are 70.5 years of age or have an inherited LLC that has an RMD.
A letter or other document signed by a real estate professional specifying the current fair market value <i>(The real estate professional must not be a disqualified person as described in IRS Publication 590.)</i>
A certified appraisal provided by a licensed appraiser

4. PARTICIPANT SIGNATURE

By signing below, I hereby acknowledge that the fair market value indicated above is true and correct to my knowledge, based on the valuation document I have attached to this form. *I understand and agree that a \$35 administrative fee may be charged.*

Signature of Participant X	Valuation as of Date (MM/DD/YYYY)	For year-end reporting, enter December 31st if value is to be reflected on year-end statement
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Please sign and submit additional documents as required.

DELIVERY INSTRUCTIONS

Email
valuation@IRAServices.com

Fax
(650) 745-2636

Regular mail
IRA Services
PO Box 7080
San Carlos, CA 94070-7080

Overnight mail
IRA Services
1160 Industrial Road, Unit 1
San Carlos, CA 94070-4128