



# REAL ESTATE PROPERTY VALUATION

**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 12<sup>th</sup> of the following year.**

Return by mail: PO Box 7080 or 1160 Industrial Rd, Ste 1, San Carlos, CA 94070-7080 | fax: 650-745-2636 | e-mail: [valuation@iraservices.com](mailto:valuation@iraservices.com)  
For inquiries, call: 800-248-8447 or visit [www.IRAServices.com](http://www.IRAServices.com)

## A. PARTICIPANT IDENTIFICATION

FULL NAME	PHONE NO.	ACCOUNT NUMBER
_____	_____	_____

## B. PROPERTY IDENTIFICATION

Parcel Number: \_\_\_\_\_

County: \_\_\_\_\_ State: \_\_\_\_\_

Property Address and/or Property Description:

\_\_\_\_\_  
\_\_\_\_\_

Your IRA's Percentage of Ownership: \_\_\_\_\_ %

## C. VALUATION

Fair Market Value of the property listed above: \$ \_\_\_\_\_ as of: \_\_\_\_/\_\_\_\_/\_\_\_\_

I have attached the following valuation document:

- A letter or other document signed by a real estate professional specifying the current fair market value  
The real estate professional must not be a disqualified person as described in IRS Publication 590.
- Most recent tax assessment notice or tax bill, if such assessment represents the fair market value
- A certified appraisal provided by a licensed appraiser

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.

## D. 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 Date