

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.

Return by regular or overnight mail: 221 South Phillips Avenue, Suite 206, Sioux Falls, SD, 57104
Fax: 605-415-4296 | E-mail: info@IRAFinancialTrust.com | For inquiries, call: 800-472-1043 or visit IRAFINANCIALTRUST.COM

A. PARTICIPANT IDENTIFICATION

NAME/LAST FIRST MIDDLE 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.

Signature _____ Date _____ / ____ / ____