

Contact Center: (800) 248-8447 | www.ForgeTrust.com

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.

## 1. PERSONAL INFORMATION (\*required field)

Should Forge Trust Co. 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 <b>EXCEPTION IF you have RMD's because you are over 72 years old or the account is an inherited IRA then the tax assessment value or tax bill is not acceptable and we need one of the options below.</b>
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 property named above does not include any illegal or impermissible investments under South Dakota or Federal law, including, but not limited to, holdings of marijuana or illegal substances, illegal gambling, or illegal artifacts, and should the custodial account ever come to hold an illegal or impermissible investment under South Dakota or federal law, custodial account holder will notify Forge Trust Co. immediately. I also 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 an 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@ForgeTrust.com

**Fax**  
(650) 745-2636

**Regular mail**  
Forge Trust Co.  
PO Box 2048  
San Francisco, CA 94126

**Overnight mail**  
Forge Trust Co.  
4 Embarcadero Ctr, Floor 15  
San Francisco, CA 94111