ForgeTrust

REAL ESTATE VALUATION

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

Complete and submit the form using one of the methods noted at the bottom of the page. Please attach your valuation document(s) to this form.

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 Only	Date of Birth* (MM/DD/YYYY)
Phone* XXX-XXX-XXXX	Email* (Your personal email only)	

2. PROPERTY IDENTIFICATION

Parcel Number			County
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 Entire Property	Valuation as of Date

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: If you are required to take an RMD because you are over age 73 or you're initiating a reportable tax event, provide documents from one of the options below.**
- ◯ 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).*
- ◯ A certified appraisal provided by a licensed appraiser.

4. CERTIFICATION

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.

Signature of Account Owner	Date (MM/DD/YYYY)
X	

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

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