

**INSTRUCTIONS**

1. Complete **one form per IRA Club account number**
2. **Submit supporting documentation** with this form via email or fax
3. Due **by Friday, January 27, 2023**. Forms received after the due date incur a \$175.00 late processing fee

The Fair Market Valuation is completed once per year to confirm or update a change in value of an asset. Please return the form to IRA Club by the due date to ensure proper reporting requirements of the IRS. Remember to submit the supporting documentation so we may process the information efficiently.

If you are 72 years and older and are required to take mandatory distributions (RMD) from a Traditional, SEP, or SIMPLE IRA account you are encouraged to seek advice from a tax preparer about how to value the assets in the account and how the estimated values may impact the RMD calculation.

**ACCEPTABLE SUPPORTING DOCUMENTATION**

- ❖ Loans / Promissory Notes: Letter or current amortization schedule showing the principal and unpaid interest owed as of 12/31/2022.
- ❖ Private LLCs, Limited Partnerships and Corporations: Letter, statement, or other record of information from the private company stating the value of your position as of 12/31/2022.
- ❖ Real Estate: realtor.com© or zillow.com© screenshot of estimated value, a broker/agent opinion or county tax assessor's appraisal.
- ❖ IRA-LLC: Letter listing all assets owned and their total value in the LLC. Also, a copy of the bank statement showing the LLC checking account balance as of 12/31/2022.

**ACCOUNT OWNER INFORMATION**

FULL NAME	IRA CLUB ACCOUNT NUMBER
EMAIL ADDRESS	PHONE NUMBER

**FAIR MARKET VALUATION**

A Better IRA Company • iraclub.org

E: valuation@iraclub.org

P: 312.795.0988

F: 312.283.2615

OWNED ASSETS	ASSET TYPE	ESTIMATED FAIR MARKET VALUE
<i>Example: 111 S Main St. #3B</i>	<i>Rental Real Estate</i>	<i>\$ 98,750.00</i>
1.		\$
2.		\$
3.		\$
4.		\$
5.		\$
6.		\$
7.		\$
8.		\$
9.		\$
10.		\$
11.		\$
12.		\$
13.		\$
14.		\$
15.		\$
<b>TOTAL</b>		

**ACCOUNT OWNER AUTHORIZATION** By signing below, I certify the information provided to IRA Club on this form is true and correct and that my valuation will be used for reporting purposes. I hereby direct IRA Club to update the value of my assets above.

SIGNATURE	PRINTED NAME	DATE SIGNED