

**Form Instructions**

1. The valuation must be performed by an independent, neutral, qualified party.
2. This form must be signed and dated by BOTH you, the account holder, and the valuator. Advanta IRA accepts emailed and faxed copies of this form.
3. This form must be sent back with supporting documents such as broker opinion of value, appraisal, financial statements showing current market value of asset.

**A K-1 is not an acceptable document because it represents a historical value.**

**Note: A separate form is needed for each asset in your account. This form is not acceptable for ROTH conversions or account distributions.**

### 1 PERSONAL INFORMATION

<b>Legal Name (Required)</b> <input type="checkbox"/> Mr. <input type="checkbox"/> Ms. <input type="checkbox"/> Mrs. <input type="checkbox"/> Dr. _____	<b>Advanta Account Number</b> _____
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### 2 ASSET INFORMATION

The asset in my account is:

**Real Estate** (Property Address): \_\_\_\_\_

**Limited Liability Company** (Name of LLC): \_\_\_\_\_

**Private Stock** (Company Name): \_\_\_\_\_

**Secured/Unsecured Note** (Principal balance required)

**Precious Metals** (Fair Market Valuation is not required)

**Brokerage Account** (Fair Market Valuation is not required)

**Other:** \_\_\_\_\_

The Value of my IRA's ownership in this asset is: \_\_\_\_\_ as of \_\_\_\_\_, which represents \_\_\_\_\_ % of the total asset value.  
 I have attached \_\_\_\_\_ as supporting documentation.

### 3 VALUATOR INFORMATION

My Valuator's name is: \_\_\_\_\_ and he/she is a/an:

CPA  Manager  Real Estate Professional  Attorney  Other: \_\_\_\_\_

### 4 SIGNATURES

**Valuator's Signature**

I certify that I am qualified to give an independent valuation/appraisal for this particular asset. I understand that this appraisal will be used for reporting purposes to the Internal Revenue Service. I understand that any false or misleading valuation/appraisal of any assets may result in penalties and fines for both the valuator/appraiser and the account owner.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Account Holder's Signature**

I certify that I am the owner of the above referenced account and that in that capacity I have retained the services of the individual listed to prepare, present, and attest to the value of the asset contained. I further certify that the information contained herein is true and accurate to the best of my knowledge.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_