
















## Real Estate Annual Valuation Instructions

	Use this form to provide Millennium Trust Company with annual valuations of real estate held in your IRA.			
	The valuations you provide must be determined by a qualified independent third party and not the IRA account owner. Request a Comparative Market Analysis (CMA) to be performed by a local Real Estate broker (Valuation Agent) and delivered to Millennium Trust Company on broker's stationery.			
	Your Valuation Agent should then return this form to you, the account owner. Please sign the form and return to Millennium Trust with the relevant supporting documents provided by your Valuation Agent.			
	<p>Valuation documents may be mailed, faxed or e-mailed to the following:</p> <table><tr><td> Mail Millennium Trust Company Attn: AltOps 2001 Spring Road, Suite 700 Oak Brook, IL 60523</td><td> Fax Attn: AltOps 630.368.5693</td><td> E-mail LPS@mtrustcompany.com</td></tr></table>	 Mail Millennium Trust Company Attn: AltOps 2001 Spring Road, Suite 700 Oak Brook, IL 60523	 Fax Attn: AltOps 630.368.5693	 E-mail LPS@mtrustcompany.com
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	Completed forms and supplemental information should be <b><u>received</u></b> each year by Millennium Trust <b><u>no later than January 15th.</u></b>			
	If you have questions, or need additional assistance, please contact Alternative Investment Client Services at 800.618.6177.			

**NOTE:** Millennium Trust requires a formal appraisal by a state-certified appraiser when: 1) property is converted to a Roth IRA, 2) a Required Minimum Distribution (RMD) is being taken, or 3) is being distributed in kind to the account owner.



2001 Spring Road, Suite 700  
Oak Brook, IL 60523  
630.368.5600 x 2023 Telephone  
630.368.5693 Fax  
LPS@mtrustcompany.com E-mail

www.mtrustcompany.com

## REAL ESTATE ANNUAL VALUATION

### A ACCOUNT INFORMATION

Account Owner's Name:  Millennium Account No.:   
Daytime Phone No.:  E-mail Address:

### B ASSET DESCRIPTION AND CURRENT VALUE

Description of Property:   
Parcel/Property Identification No. (PIN):   
Property Address:   
City:  State:  Zip:   
Original purchase price of asset:  Date Acquired:

The Current Valuation of this Property as of , 20  is \$ . The valuation must be no more than 180 days prior to the date of the Valuation Agent's signature.

**(Attach supporting valuation material such as the property Comparative Market Analysis (CMA) or valuation statement with cover letter from valuation agent on company letterhead.)**

### C VALUATION AGENT

Name:  Title:   
Company Name:   
Company Address:   
City:  State:  Zip:   
Daytime Phone No.:  E-mail Address:

I certify that I am qualified to give an independent valuation for the above named property as either a certified real estate appraiser or a fully licensed real estate broker/agent qualified to issue a Comparative Market Analysis. I understand that the valuation I have provided will be reported by Millennium Trust to the Account Owner as the value of the property and will be used for reporting to the Internal Revenue Service.

Valuation Agent Signature: \_\_\_\_\_ Date:

### D ACCOUNT OWNER 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 in Part C to prepare, present and attest to the value of the asset described in Part B. I further certify that the information contained herein is true and accurate to the best of my knowledge.

Account Owner Signature: \_\_\_\_\_ Date:

