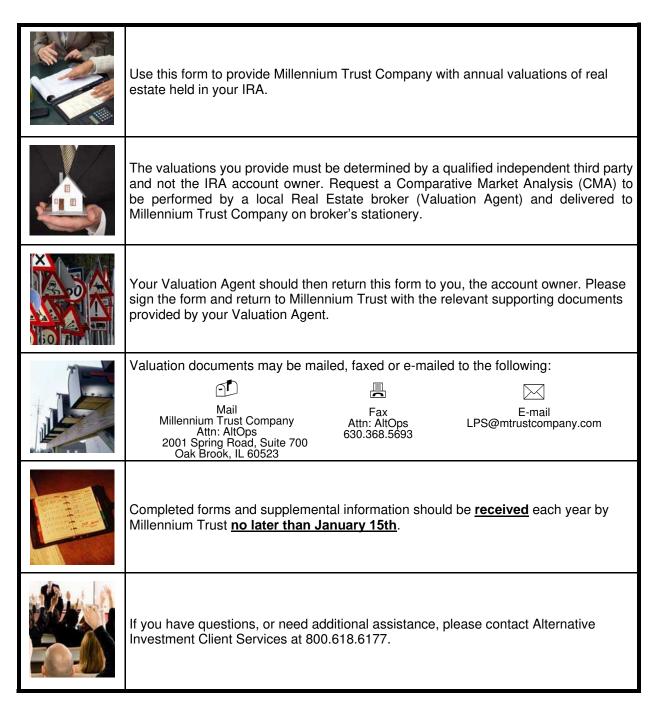


# **Real Estate Annual Valuation Instructions**



**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.



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# REAL ESTATE ANNUAL VALUATION

### www.mtrustcompany.com

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: Zi	p:
Original purchase price of asset:	Date Acquired:	
The Current Valuation of this Property as of valuation must be no more than 180 days prior to the date of the	, 20 is \$	. The

(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: 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:	



ALT-013