
















Real Estate Annual Valuation Instructions

	<p>Use this form to provide Millennium Trust Company with annual valuations of real estate held in your IRA.</p>			
	<p>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.</p>			
	<p>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>			
	<p>Valuation documents may be mailed, faxed or e-mailed to the following:</p> <table style="width: 100%; text-align: center;"> <tr> <td data-bbox="467 1060 743 1220">  Mail Millennium Trust Company Attn: AltOps 820 Jorie Blvd., Suite 420 Oak Brook, IL 60523 </td> <td data-bbox="836 1060 982 1186">  Fax Attn: AltOps 630.368.5693 </td> <td data-bbox="1079 1060 1356 1165">  E-mail LPS@mtrustcompany.com </td> </tr> </table>	 Mail Millennium Trust Company Attn: AltOps 820 Jorie Blvd., Suite 420 Oak Brook, IL 60523	 Fax Attn: AltOps 630.368.5693	 E-mail LPS@mtrustcompany.com
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	<p>Completed forms and supplemental information should be received each year by Millennium Trust no later than January 15th.</p>			
	<p>If you have questions, or need additional assistance, please contact Alternative Investment Client Services at 800.618.6177.</p>			

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.



820 Jorie Blvd. Suite 420
 Oak Brook, IL 60523
 630.368.5600 x 2023 Telephone
 630.368.5693 Fax
 LPS@mtrustcompany.com E-mail

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: _____ 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: _____

