

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, or 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

Legal Name (Required)

Mr. Ms. Mrs. Dr. _____

Advanta IRA Account Number: _____

2 ASSET INFORMATION

The asset in my account is:

Asset Name: _____

Asset Type: _____

CUSIP: _____

Value of IRA ownership in this asset: _____

Date of Value: _____

Attached supporting documentation: _____

3 VALUATOR INFORMATION

Name of Valuator: _____

Valuator Qualification:

CPA Manager Real Estate Professional Attorney Other: _____

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: _____

4 SIGNATURE

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: _____