



Annual Fair Market Valuation

NuView IRA - Processing Office
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On behalf of our Custodial Bank, NuView IRA, Inc., is required to receive a current fair market valuation for your investment(s) annually to ensure proper IRS tax reporting. When providing an asset's current value, please provide all supporting documentation to substantiate the value. Please be advised that this valuation/appraisal will be used for reporting purposes to the Internal Revenue Service and that any false or misleading valuation/appraisal of any assets may result in penalties and/or fines assessed to the account holder. You may submit this form via email, fax, or mail. This form is also available for completion online through the MyNuView client web portal at www.nuviewira.com.

EXAMPLES OF SUPPORTING DOCUMENTS

- Real Estate:** Broker Price Opinion, Comparative Market Analysis
- Performing Note/Mortgage/Settlement:** Amortization schedule (no documentation needed for interest-only notes)
- Non-Performing Note/Mortgage/Settlement:** Payment history and payoff schedule
- Private Entity (LP, LLC, C-Corp, Land Trust):** Independent valuation, Financial statements

1 GENERAL INFORMATION

Account Holder's Name <input type="checkbox"/> Mr. <input type="checkbox"/> Ms. <input type="checkbox"/> Mrs. <input type="checkbox"/> Dr. _____	NuView Account Number
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2 ASSET INFORMATION

Asset Symbol/CUSIP	Asset Type
Asset Description	

3 VALUATION INFORMATION

Current Fair Market Value*	Valuation Date	Valuator Name	Valuator Phone
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4 ACKNOWLEDGEMENT

I certify that I am the account holder of the above listed IRA account and that all the information on this form is accurate. Furthermore, I authorize NuView to update the value of the above asset in my account and report the valuation to the IRS. I understand that the IRS requires annual valuations, and that if this form is not returned, NuView IRA, Inc. or its Custodian may be required to obtain valuation on behalf of my IRA and charge any applicable fees incurred or may no longer be able to hold the asset on behalf of my IRA. I also certify this asset does not directly or indirectly violate any Federal or South Dakota State Laws, including, but not limited to, holdings of marijuana or other illegal substances, illegal gambling, or illegal artifacts.

Account Holder Signature: _____ Date: _____

*For assets with a zero value, please complete a Fair Market Valuation form for worthless assets. This form is available online at www.nuviewira.com.