



# 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. To facilitate this, please have a qualified, independent third party perform the valuation and then complete this fair market value (FMV) form. 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](http://www.nuviewira.com).

EXAMPLES OF SUPPORTING DOCUMENTS	EXAMPLES OF QUALIFIED VALUATORS
<b>Real Estate:</b> Broker Price Opinion, Comparative Market Analysis	Licensed Real Estate Professional    Managing Partners
<b>Performing Note/Mortgage/Settlement:</b> Amortization schedule (no documentation needed for interest-only notes)	Property Appraiser    Company Financial Officer
<b>Non-Performing Note/Mortgage/Settlement:</b> Payment history and payoff schedule	Valuation Firms    Loan Servicer
<b>Private Entity (LP, LLC, C-Corp, Land Trust):</b> Independent valuation, Financial statements	Auditor    Arm's length Investment Professional
	CPA or Tax Professional

## 1 GENERAL INFORMATION

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

<b>Asset Symbol/CUSIP</b> _____	<b>Asset Type</b> _____
<b>Asset Description</b> _____	

## 3 VALUATION INFORMATION

<b>Current Fair Market Value*</b> _____	<b>Valuation Date</b> _____	<b>Valuator Name</b> _____	<b>Valuator Phone</b> _____
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### VALUATOR ACKNOWLEDGEMENT

I hereby certify that I am qualified to give an independent valuation for the above referenced asset. I understand that the above information will be used by NuView IRA to report the value to the Internal Revenue Service (IRS) and any false or misleading valuation may result in penalties and/or fines to both the valuator and the account holder.

Valuator 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.nuviewtrust.com](http://www.nuviewtrust.com).*

## 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: \_\_\_\_\_