

Fair Market Valuation Form

To avoid IRS Penalties and additional CamaPlan fees, this form must be completed and returned to CamaPlan no later than January 15, 2018. A Statement¹ of your account is provided for reference.

Fax: 973-302-8622

Email: fmvnotice@camaplan.com.

Mail: 122 E. Butler Ave., Ste. 100, Ambler, PA 19002

A qualified, independent third party should complete the valuations/appraisals. If your IRA own a percentage of the asset being valued, please indicate your percentage of ownership, and the value of that percentage. If you need more space, additional forms are at www.CamaPlan.com or you may make a copy of this form.

Failure to return a completed, accurate Fair Market Valuation form by January 15, 2018 will result in a \$100 late fee. CamaPlan reserves the right to assign, determine, calculate and assess fees to your account for determining a reasonable fair market value. If a valuation is three or more years old, CamaPlan reserves the right to resign as the record keeper of the account.

Are you, or will you be, 70-1/2 years old or older on December 31, 2017? Required Minimum Distributions for 2018 from non-Roth accounts are based on your account value as of December 31, 2017. **To avoid severe IRS penalties, valuation of assets in your account must be accurate and current.**

IRA/QP Owner Name: _____ CamaPlan IRA/QP Account Number: _____

Asset Name/CUSIP	FMV of asset as of 12/31/2017 ² (N/C if No Change)	Percent of asset owned by you (if applicable)	Valuation Date	Valuator/Appraiser Name & Address ³

¹ You **DO NOT** have to include valuations for cash, precious metals, brokerage accounts or other assets in your account that have a readily accessible market value.

² Documentation- Please include supporting documentation with regards to this valuation/appraisal.

³ I certify that I am qualified to give an independent valuation/appraisal for this asset. I understand this appraisal will be used for reporting to the Internal Revenue Service. I understand that any false or misleading valuation/appraisal may result in penalties and fines for both the valuator/appraiser and the account owner.

Account Signature _____ Date _____

Valuator/Appraiser _____ Date _____