

# FAIR MARKET VALUATION FORM



**NEXT GENERATION SERVICES, LLC**, 75 LIVINGSTON AVE. STE. 110, ROSELAND, NJ 07068 | P: (973) 533-1880 \* F: (973) 533-1088

**PERSONAL INFORMATION:**

Account Holder Name \_\_\_\_\_ Account Number \_\_\_\_\_

CUSIP \_\_\_\_\_

Asset Description \_\_\_\_\_

**PERSONAL INFORMATION:**

Fair Market Value \$ \_\_\_\_\_

Description of Supporting Documentation: *Please attach supporting documentation substantiating this valuation.* \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Date of Valuation \_\_\_\_\_

**THIRD PARTY INFORMATION:**

Appraiser/Valuator Name \_\_\_\_\_

Title \_\_\_\_\_

Telephone \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

**SIGNATURES:**

I certify that I am qualified to give an independent valuation/appraisal for this particular asset. I understand that this valuation/appraisal will be used for reporting purposes to the Internal Revenue Services. 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.

Appraiser/Valuator \_\_\_\_\_ Date \_\_\_\_\_

Account Holder \_\_\_\_\_ Date \_\_\_\_\_

**Note:** Next Generation Trust Company reserves the right to assign, determine, calculate, and assess your account a fee for determining a reasonable fair market value to your self-directed account. If a valuation is three or more years old, Next Generation Trust Company reserves the right to resign as Custodian of the account.