



**QUEST TRUST**  
C O M P A N Y

# Fair Market Valuation Form

**Quest Trust Company**  
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### Form Instructions

This form must be signed by both the account holder and the valuator. This form must be sent back with supporting documents such as an appraisal, broker opinion, or financial statement.

**Note: A separate form is needed for each asset in your account.**

## ACCOUNT HOLDER INFORMATION

Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

## ASSET INFORMATION

Real Estate (Property Address): \_\_\_\_\_

Limited Liability Company, Joint Venture, Corporation (Name of Company): \_\_\_\_\_

Private Stock (Name of Company): \_\_\_\_\_

Secured Note (Collateral or Borrower Name): \_\_\_\_\_

Unsecured Note (Borrower Name): \_\_\_\_\_

Other: \_\_\_\_\_

The total value of this asset is \$ \_\_\_\_\_ as of (ex 12/31/2020): \_\_\_\_\_

The percentage of ownership of asset by account is \_\_\_\_\_%. The value of account's percentage is \$ \_\_\_\_\_

## THIRD PARTY VALUATOR INFORMATION (SUPPORTING DOCUMENTATION REQUIRED)

Valuator's Name: \_\_\_\_\_

Valuator is a:            CPA            Real Estate Professional            Attorney            Manager            Other: \_\_\_\_\_

I certify that I am qualified to provide an independent valuation for the asset listed above. I have attached documentation to support the value provided. I understand this valuation will be used to report the asset's value to the Internal Revenue Service. I understand that any false or misleading valuation/appraisal of any assets may result in penalties.

Signature of Valuator: \_\_\_\_\_ Date: \_\_\_\_\_

## SIGNATURE

I certify that the valuation provided is accurate to the best of my knowledge. I understand that this valuation will be used to report the asset's value to the Internal Revenue Service. I understand that any false or misleading valuation/appraisal of any assets may result in penalties.

Prepared By:

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

Limited Power of Attorney \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_