



## Real Estate Valuation

### CLIENTS IN REQUIRED MINIMUM DISTRIBUTION STATUS

Automated valuation models (AVMs) - The independent firm we have engaged, as well as some of the valuation sources listed within this document such as third-party valuation websites utilize automated valuation models (AVMs) to derive a value. AVMs use statistically based computer programs that use real estate information such as comparable sales, property characteristics, and price trends to provide a current estimate of market value for a specific property. For individuals who are required to take mandatory distributions (RMDs) from an IRA or retirement account, we encourage you to seek guidance from your tax professional about how that estimated value from the AVM may impact your RMD calculation. You may need to adjust your calculation. Please consult with your tax advisor.

### DELIVERY INSTRUCTIONS

Complete this worksheet and return it along with required supporting documentation using one of the following delivery methods:

- Upload documents at [PacificPremierTrust.com/upload](https://PacificPremierTrust.com/upload). (Select "Real Estate Valuations" in the drop-down menu)
- E-mail to: [AnnualValuations@PacificPremierTrust.com](mailto:AnnualValuations@PacificPremierTrust.com)
- Mail to: Pacific Premier Trust, Processing Center, P.O. Box 981012, Boston, MA 02298

To avoid delays in processing, please ensure all required fields are complete and the appropriate supporting documentation is attached. **DO NOT USE THIS FORM FOR PRIVATE EQUITY, PRIVATE DEBT OR PROMISSORY NOTE INVESTMENTS SECURED BY MORTGAGES/TRUST DEEDS.**



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## INSTRUCTIONS

- Please complete the fields below and refer to the directions for each step. **ALL FIELDS AND STEPS ARE MANDATORY UNLESS NOTED.**
- Backup documentation **MUST** be submitted with this worksheet.
- Do not use this form for private equity, private debt or promissory note investments secured by mortgages/trust deeds.

## ASSET INFORMATION

PROPERTY NAME (ASSET DESCRIPTION)	ASSET ID (CUSIP)
ACCOUNT NAME	ACCOUNT NO.

STEPS	DIRECTIONS	WORKSHEET
1	Enter the percentage of ownership that your retirement account has in the property listed above. If your account is the sole owner, enter 100%.	The percent of property ownership by my retirement account is (0.1-100%) _____%.
2	Enter the current market value for your retirement account's percentage of ownership.	The current market value for my retirement account's percentage of ownership in the property listed above is \$ _____.

Please review this list of documents supporting your valuation that will be accepted by Pacific Premier Trust.  
**SUPPORTING DOCUMENTATION MUST BE SUBMITTED ALONG WITH THIS FORM.**

## SUPPORTING DOCUMENTATION OPTIONS FOR REAL ESTATE VALUATIONS

- Realtor.com or Trulia.com screen-print showing estimated value
- County Tax Assessor's appraisal with listed fair market value only (assessed and taxable value do not reflect fair market value and cannot be used)
- Comparative Market Analysis from a real estate professional
- Certified appraisal from the past 12 months

Pacific Premier Trust performs the duties of an independent custodian of assets for self-directed individual and business retirement accounts and does not provide investment advice, sell investments or offer any tax or legal advice. Clients or potential clients are advised to perform their own due diligence in choosing any investment opportunity as well as selecting any professional to assist them with an investment opportunity.

**NON-DEPOSIT INVESTMENT PRODUCTS ARE NOT INSURED BY THE FDIC; ARE NOT DEPOSITS OR OTHER OBLIGATIONS OF, OR GUARANTEED BY, THE BANK OR ANY OF ITS DIVISIONS; AND ARE SUBJECT TO INVESTMENT RISKS, INCLUDING POSSIBLE LOSS OF THE PRINCIPAL AMOUNT INVESTED.**