



Fair Market Valuation - IRA

FORM INSTRUCTIONS

This form is designed to assist SouthStar Bank Self-Directed IRA account holders determine the value of their LLC or Trust owned by the IRA. Per IRS guidelines, SouthStar Bank is required to receive the Fair Market Value of your assets at least once per year. Since this is a Self-Directed IRA, you are required to verify values from an independent third party.

1 ACCOUNT INFORMATION

CLIENT NAME	SouthStar Bank SDIRA #
ASSET NAME (LLC or Trust Name)	

2 FAIR MARKET VALUE of assets held in LLC or Trust owned by IRA

SSB LLC/Trust Checking Account	VALUE
Other LLC/Trust Checking Accounts	VALUE
Nondeposit Investment	VALUE
Total Value of LLC/Trust \$	

(If more than 5 Nondeposit investments please use additional form(s))

3 ACCOUNT HOLDER SIGNATURE

I certify that I obtained independent valuations/appraisals for my non-cash investments. I will retain supporting documents for my records. I understand the valuations will be used for reporting purposes to the Internal Revenue Service. I understand that any false or misleading valuation/appraisal of any assets may result in penalties and fines for the account owner.

Account Holder Signature: _____ Date: _____

For processing return to:
 PO Box A, Moulton, TX 77975 or use our Secure Email Upload