

# ANNUAL INFORMAL VALUATION STATEMENT

As of \_\_\_\_\_, the estimated value of \_\_\_\_\_  
(Plan Year-End Date) (Name of Corporation)  
was \$ \_\_\_\_\_.  
(Business Value)\*

I certify this is true to the best of my knowledge,

\_\_\_\_\_  
Name of Trustee or CPA

\_\_\_\_\_  
Today's Date

\* IMPORTANT: You may not use the same informal value year after year as this is not accepted by the IRS.