

# PROSPECTIVE APPRAISER PARTNER APPLICATION PACKAGE



**Strategic Valuation Partners**

Phone: (866) 787-5111

Fax: (866) 787-5112

[www.strategicvaluationpartners.com](http://www.strategicvaluationpartners.com)



## **SVP APPRAISER REQUIRED INFORMATION** **& DOCUMENT CHECKLIST**

Prior to being placed on the Approved Appraiser List, SVP requires appraisers who are interested in joining the partnership to submit the following documents:

- 1) SVP Appraiser Profile Form
- 2) Acknowledgement of Terms
- 3) Request for Taxpayer Identification Number & Certification Form (W-9)
- 4) Copy of Errors and Omissions Insurance Declarations Page
- 5) Copy of current license or State Certification(s) for all appraisers within your firm
- 6) Copy of Resume or Qualifications for all appraisers within your firm
- 7) Sample reports for URAR (1004), Multi-Family
- 8) 2 to 3 References for Residential
- 9) Direct Deposit Information Form
- 10) How many appraisals per week can you complete?

Please complete and return **all** documents via fax, E-mail, or mail to:

**Strategic Valuation Partners**  
**7662 Slate Ridge Blvd**  
**Reynoldsburg, OH 43068**

**FAX:** (866) 787-5112

**E-MAIL:** [info@strategicvaluationpartners.com](mailto:info@strategicvaluationpartners.com)

If you have any questions, please contact SVP at **1-866-787-5111**



## SVP APPRAISER PROFILE FORM

**To Fax this form:** Print document. Fill out all informational fields, and fax directly to (866) 787-5112.

<b>Appraisal Company Name</b>			
<b>Principal(s)</b>			
1.			
2.			
3.			
<b>Street Address</b>			
<b>City/State/Zip Code</b>			
<b>Office Phone</b>			
<b>Office Fax</b>			
<b>Office General E-mail Address</b>			
<b>Web Address</b>			
<b>Primary SVP Contact Person</b>			
<b>Names of Licensed and Certified General Appraisers</b>	<b>Years of Appraisal Experience</b>	<b>State(s) of Certified General or Licensed Appraiser</b>	<b>Original Year of licensed or Certified General Certification</b>
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			

### COVERAGE AREAS AND FEES BY APPRAISAL TYPE (State/County)

1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			



## **SVP APPRAISER ACKNOWLEDGEMENT OF TERMS**

The undersigned agrees that Appraiser will be working as an independent contractor and not as an employee of Strategic Valuation Partners LLC (SVP), and as such acknowledges and agrees to the following:

- Appraiser shall at all times comply with the Uniform Standards of Professional Appraisal Practice (“USPAP”) as well as all federal, state, local laws, regulations, and ordinances
- Appraiser must personally sign-off on all appraisal reports
- Appraiser shall not delegate any assigned Orders from SVP to appraisers outside of the Appraiser’s company without the written permission of SVP
- All Appraisal Reports must be generated and delivered using SVP’s proprietary software and electronic ordering and delivery system
- Except where otherwise authorized, Appraiser agrees to use SVP’s appraisal format and proprietary software for the exclusive purpose of generating and delivering reports ordered through SVP
- Appraiser agrees that all correspondence regarding the appraisal assignment must be between the Appraiser and SVP, and that Appraiser will not contact third parties directly without first obtaining permission from SVP
- Appraiser acknowledges that SVP has made no agreement guaranteeing any volume of business in exchange for entering this contractual relationship

Furthermore, the undersigned certifies that he/she has read, understands, and agrees to the following privacy policy:

**Confidentiality.** SVP will provide Appraiser with customer information (e.g., name, property, address, etc.) in order for the Appraiser to conduct an appraisal. The Appraiser shall maintain the confidentiality of all information provided or related to the appraisal and use it only for the purposes of providing the Services under this Agreement. The Appraiser agrees to handle all customer information consistent with all applicable federal and state laws including but not limited to Title V of the Gramm-Leach-Bliley Act and its implementing regulations (16 C.F.R. Part 313). The Appraiser specifically acknowledges that it is prohibited from directly or indirectly selling, loaning, renting, transferring, disclosing, conveying, or otherwise making available to any third parties any customer information provided or related to the Services under this Agreement.

### **Agreement To All Terms**

By signing here, the undersigned agrees to all terms as stated above.

\_\_\_\_\_  
**Appraiser’s Name (please print)**

\_\_\_\_\_  
**Appraisal Company**

\_\_\_\_\_  
**Appraiser’s Signature**

\_\_\_\_\_  
**Date**



## **INVOICE & DIRECT DEPOSIT POLICY**

### ***Invoice & Payment Policy***

It is neither required, nor desired for SVP Appraiser Partners to invoice SVP for completed Appraisal Reports. For quicker receipt of payment, SVP encourages its Appraiser Partners to enroll in SVP's Direct Deposit Program expressed in more detail below.

### ***Direct Deposit Policy***

Appraisers who wish to be paid directly into an account of their choice are required to provide the following information to SVP:

- A Voided Check clearly showing the account and routing numbers to which money is to be deposited
- Tax Identification Number of the Appraisal Company

*Please note that payments cannot be processed until SVP has received all required information including a signed W-9 form, Acknowledgement of Terms, Resume, and copies of state appraiser license and E&O Insurance. Any questions are to be directed to SVP at 1-866-787-5111.*

## Request for Taxpayer Identification Number and Certification

**Give form to the  
requester. Do not  
send to the IRS.**

<b>Print or type See Specific Instructions on page 2</b>	Name (as shown on your income tax return)	
	Business name, if different from above	
	Check appropriate box: <input type="checkbox"/> Individual/ Sole proprietor <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Other ▶ .....	
	<input type="checkbox"/> Exempt from backup withholding	
	Address (number, street, and apt. or suite no.)	Requester's name and address (optional)
	City, state, and ZIP code	
List account number(s) here (optional)		

### Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on Line 1 to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

<b>Social security number</b>								

**or**

<b>Employer identification number</b>								

**Note.** If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

### Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. person (including a U.S. resident alien).

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN. (See the instructions on page 4.)

<b>Sign Here</b>	Signature of U.S. person ▶	Date ▶
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### Purpose of Form

A person who is required to file an information return with the IRS, must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

**U.S. person.** Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee.

In 3 above, if applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

**Note.** If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

For federal tax purposes, you are considered a person if you are:

- An individual who is a citizen or resident of the United States,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States, or
- Any estate (other than a foreign estate) or trust. See Regulations sections 301.7701-6(a) and 7(a) for additional information.

**Special rules for partnerships.** Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

The person who gives Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States is in the following cases:

- The U.S. owner of a disregarded entity and not the entity,