

# APPRAISE

By Evaluation Services, Inc.  
*Makes it Simple!*

*Quick, Accurate, and Economical  
Historical Stock & Bond Valuations  
for Trusts and Estates*

## Industry News

This week's feature article is:  
"State Experimentation With Wealth Taxes"

**Excerpt (from actual article):**

"The idea of a wealth tax as a panacea for budgetary shortfalls at the federal and state levels has been around since at least the 1930s. Recently, using wealth as a source of tax revenues has heated up."



You can read the article by clicking [HERE](#).

Last week's feature article was:  
"Need an Estate Planning Checkup?  
Now Is the Perfect Time"

You can read last week's eNewsletter by clicking [HERE](#).

## Helpful Hint

This week's topic is:

### "Regulations for preparing Alternate valuation date reporting"

Recently, one of our clients asked for the IRS regulations which we utilize for IRS Form 706 Alternate valuation date reporting. Here is a [link](#) to the regulations.

Last week's topic was:

"Phone call from retiring client"

You can read last week's eNewsletter by clicking [HERE](#).



## Upcoming Events

- Feb 18-20: We are upgrading our digital storage over President's Day weekend and all online services will be unavailable.
- Mon, Feb 20: NASDAQ & NYSE closed for the President's Day holiday. We are closed as well.



**These are the valuations we provide and how you can get them.**

- ✓ IRS Form 706 Estate Tax Valuations
- ✓ IRS Form 709 Gift Tax Valuations
- ✓ CRUT & GRAT Valuations
- ✓ Corporate Actions, Splits, & Dividends
- ✓ Cost Basis for Dividend Reinvestment
- ✓ Form 8971 Reporting
- ✓ Allocate Income Between Form 1040 & 1041 for Calendar & Fiscal Year
- ✓ Fiduciary Accounting
- ✓ Cost Basis Calculator
- ✓ Domestic & International Securities

**APPRAISE** Secure Online Solutions *(You produce the report and save money)*

- **APPRAISE** SaaS      SaaS means Software as a Service; We host the software eliminating upgrades; you save the portfolios on your computer for security
- **APPRAISE** Web      Everything is run from the internet using a credit card or account number
- **APPRAISE** Software      Software is installed on your computer and portfolios are saved there as well
- **APPRAISE** ESI-Direct      No valuation software; value your OTEA securities using the internet

**APPRAISE** Outsourcing Solutions *(We do the work using your list of assets and save you time)*

- Valuations can be submitted/delivered via email, fax, overnight courier, or mail

## Are you the correct recipient of this eNewsletter?

Perhaps your coworker or colleague would benefit from the information contained in this eNewsletter. Please feel free to share it with them. They can then sign up for their own subscription by clicking on the link below.

[Sign up for ESI-APPRAISE notifications and weekly eNewsletters](#)

You can 'Safely Unsubscribe' by clicking on the link at the bottom of this eNewsletter.

Thank you for subscribing and allowing us to serve you.

---

### Evaluation Services, Inc.

180 OLD TAPPAN ROAD,  
BUILDING 4, OLD TAPPAN, NJ  
07675  
(201) 784 8500  
[appraisenj.com](http://appraisenj.com)

Contact  
Us



Evaluation Services, Inc. | 180 OLD TAPPAN ROAD, BUILDING 4, OLD TAPPAN, NJ 07675

[Unsubscribe charles\\_s\\_rossmann@appraisenj.net](mailto:unsubscribe_charles_s_rossmann@appraisenj.net)

[Constant Contact Data Notice](#)

Sent by editor@appraisenj.net powered by



Try email marketing for free today!