"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
February 14, 2023



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:
"How to Help Middle-Rich Clients"

Excerpt (from actual article):

"Techniques to help minimize estate tax liability for the merely rich, without the cutting-edge strategies often used by the ultra-wealthy."

You can read the article by clicking **HERE**.

Last week's feature article was: "State Experimentation With Wealth Taxes"

You can read last week's eNewsletter by clicking **HERE**.



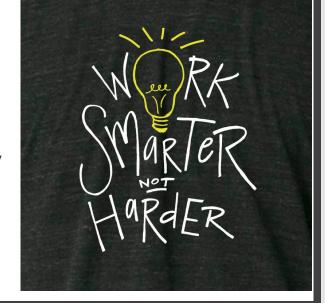
Helpful Hint

This week's topic is:

"Setting up a webappraise account"
One of the options we offer our clients for estate and gift tax valuations, in addition

to software and software as a service, is a web based solution. It's easy to set up a new account. All you need to do is go to webappraisenj.com and scroll down to "I do not have an account."

Last week's topic was:
"Regulations for preparing Alternate
valuation date reporting"
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

✓ Form 8971 Reporting

✓ IRS Form 709 Gift Tax Valuations
✓ Allocate Income Between Form
1040 & 1041 for Calendar & Fiscal Year

✓ CRUT & GRAT Valuations

✓ Fiduciary Accounting

✓ Corporate Actions, Splits, & Dividends
✓ Cost Basis Calculator

✓ Cost Basis for Dividend Reinvestment ✓ 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 Contact Us





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

Unsubscribe charles s rossmann@appraisenj.net

