

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:
**"Estate Planning for Memorabilia
Collectors: Don't Leave Your Family in
the Lurch"**

Excerpt (from actual article):
"No one else in this financial planner's
family has any interest in the sports
memorabilia he's accumulated. But he's
made a plan and has some advice for
people like him."

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

Last week's feature article was:
**"Presley beneficiary battle sets
example of poor estate planning
practices"**

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



Helpful Hint

**This week's topic is:
"Stock Splits"**

We receive many questions about the terms of stock splits and their impact on particular date of death and alternate date valuations. For example, a client had a husband and wife who owned shares of Amazon. The wife passed on Feb 6, 2022 and the husband soon followed on June 19, 2022. The client needed to know the terms of the 2022 Amazon stock split so they could calculate the numbers of shares held on the date of death. [Here is the information](#) we provided which allowed for accurate valuations to be prepared.



**Last week's topic was:
"System Maintenance on Weekends"**

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

Upcoming Events

- Fri, Mar 24: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.



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

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