

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter  
September 17, 2024

## Trusts & Estates News

This week's Trust and Estate article is:  
**"What Clients Can Learn from Warren Buffett's Estate Plan"**

(Excerpt from actual article):  
His three children control what becomes of his remaining fortune.

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

Last week's Trust & Estate article was:  
**"Navigating Estate Planning As The TCJA Nears Expiration"**

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



## Helpful Hint

This week's Helpful Hint is:  
**"Have you considered the possibility of preparing estate and gift tax valuations using an [integrated API solution](#) instead of software?"** Appraise API provides a secure interface that streamlines portfolio pricing. This is done by allowing clients to program directly from their trust system into our proprietary Appraise pricing system and customize it for their reporting needs. No personal or client data is exchanged. If you are looking for a way to cut costs, improve efficiency, and improve your processing metrics, this webinar may be of interest to you.

You can sign up for our September 26 webinar, **"APPRAISE API - Integrated Estate & Gift Tax Valuations"**, by clicking [HERE](#).

Last week's Helpful Hint was:  
**"What is a daily dividend fund and how to include daily dividends which are earned, but not yet paid, in your**



## Appraise valuation"

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

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## Weekly Financial Market Review

Our business resides at the intersection of trust & estate law as well as financial data reporting.

We make it easy for our clients to stay current on financial market news by making a weekly market recap available by clicking [HERE](#).



## Upcoming Events

(Subject to change - please monitor regularly)

- **Thu, Sep 19:** (5:00p EDT) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- **Sat, Sep 21:** (9:00a EDT) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- **Thu, Sep 26:** (11:30a EDT) September webinar - "APPRAISE API - Integrated Estate & Gift Tax Valuations"
- **Mon, Jan 13 to Fri, Jan 17:** We will be exhibiting at 59<sup>th</sup> Annual Heckerling Institute on Estate Planning.



## Is there a better way to prepare your valuations?

Why don't you consider us for your stock and bond valuations for trusts & estates? Maybe there is a better way than how you are doing them now?

We've been providing these valuations since 1985 and have experience and insight. Our pricing universe contains millions of US and foreign securities with corresponding decades of history. We can speak with you to potentially identify ways to improve accuracy, productivity, and output.



### 1. Secure online solutions (You do the work to save money.):

- **APPRAISE.API:** a secure interface that streamlines portfolio pricing. This is

done by allowing clients to program directly from their trust system into our proprietary pricing system and customize it for their reporting needs. No personal or client data is exchanged. This can be a way to cut costs, improve efficiency, and improve your processing metrics.

- **APPRAISE.Web:** A web-based application, accessed through any browser, that provides stock and bond valuations for estate, gift, and trust tax. Portfolios are saved to your account and accessible wherever you are, on any device.
- **APPRAISE.Software:** Our proprietary software that has been serving our clients since 1985. Install it on any computer and get the estate, gift, and trust tax valuations you need quickly, accurately, and securely.
- **APPRAISE.SaaS:** Software as a Service (SaaS) means we host the software, which you access via the internet, and you store your data locally on your computer. This benefits you and your information technology group because a hybrid solution takes the best of software and web and combines them. You're always running the current version and do not need to install updates. Your portfolio data is stored securely on your computers. It's easy to add and remove users. The underlying technology is Citrix.
- **ESI-Direct:** Thomson Reuters ONESOURCE Trust & Estate securities valuations without valuation software. Everything is done from within the Accounting or 706, reducing steps, saving time, and increasing accuracy.

## 2. Outsourcing solution (We do the work and save you time.):

Valuations can be submitted/delivered via email, fax, overnight courier, or mail. Click [HERE](#) for an order form.

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Thank you for subscribing and allowing us to serve you.

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