APPRAISE
By Evaluation Services, Inc.
Since 1985

Fast, Accurate, Easy and Economical
Historical Stock & Bond Valuations for Trusts & Estates
✓ First Class Service ✓ Innovative Technology ✓ IRS Accepted

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
October 15, 2024

Trusts & Estates News

This week's Trust and Estate article is:
"National Estate Planning Awareness Week"

(Excerpt from actual article):
National Estate Planning Awareness Week occurs during the third full week of October each year and was adopted in 2008 by the House of Representatives to help the public understand what estate planning is and why it is such a vital component of financial wellness.

As leaders in the estate planning community, your members have first-hand experience with the challenges Americans face saving, investing, and planning for their future.

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

Last week's Trust & Estate article was:
"Good Estate Planning Never Goes Out of Style"

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

Helpful Hint

This week's Helpful Hint is:
"The US stock exchanges were open and the bond markets were closed"
On Monday, October 14, the Columbus / Indigenous People day holiday, the stock markets were open and the bond markets were closed. If the date of death is October 14, and the portfolio contains bonds, the valuation cannot be run until Wednesday, October 16 because the Tuesday bond prices are required.

Last week's Helpful Hint was:
"Why CUSIP numbers are better

identifiers than ticker symbols for valuations"

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

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, Oct 17:** (5:00p EDT) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- **Thu, Oct 24:** (11:30a EDT) October webinar - **"*Estate & Gift Tax Valuations in the Cloud.*"**
- **Mon, Jan 13 to Fri, Jan 17:** We will be exhibiting at the 59th annual Heckerling Institute on Estate Planning. Plan on stopping by to visit us.

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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