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
December 3, 2024

Trusts & Estates News

This week's Trust and Estate article is:
"Estate Planning Services Are Becoming Table Stakes"

(Excerpt from actual article):
Clients increasingly view estate planning as a core element of holistic wealth management, not just a one-time task, according to a survey from online estate planning platform Vanilla.

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

Last week's Trust & Estate article was:
"Estate and Inheritance Taxes by State, 2024"

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

Helpful Hint

This week's Helpful Hint is:
"Pricing Options: Calls, Puts"

This past week, one of our clients asked whether we can price options. The answer is yes. We have a research tool to look up the necessary identifier for pricing. The tool requires: ticker symbol, maturity date, strike price, and number of options.

If you have questions, you can **EMAIL US** for more information.

Last week's Helpful Hint was:
"Why are these prices higher than I expected?"

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

We explain the six methods we have for

obtaining valuations from us in the **"Is there a better way to prepare your valuations?"** section of this eNewsletter. There are technology and outsourcing solutions.

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**.

Please visit us at the 2025 Heckerling Institute

We will be exhibiting at the 2025 Heckerling Institute on Estate Planning. Please stop by and visit us at booth #501 which is across from the registration desk.

We will be celebrating our 40th anniversary, which begins on January 1, 2025 and have plenty of exciting things to talk about!

Upcoming Events

(Subject to change - please monitor regularly)

- **Thu, Dec 5:** (5:00p EST) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- **Thu, Dec 19:** (11:30a EST) Webinar introducing our new website celebrating our 40th anniversary!
- **Tue, Dec 24:** (1:00p EST) The NASDAQ & NYSE exchanges are closing at 1:00p ET. ESI-APPRAISE Customer Service / Technical Support will be closing at 1:00p ET, as well. All online systems will still be available.
- **Fri, Dec 27:** (3:00p EST) ESI-APPRAISE Customer Service / Technical Support will be closing at 3:00p ET to celebrate our 40th

anniversary year which begins on January 1. All online systems will still be available.

- **Tue, Dec 31:** (2:00p EST) ESI-APPRAISE Customer Service / Technical Support will be closing at 2:00p ET for the New Years Day holiday. All online systems will be still be available.

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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