APPRAISE

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40th ANNIVERSARY

QUICK, ACCURATE, AND ECONOMICAL STOCK & BOND VALUATIONS FOR TRUSTS AND ESTATES
FIRST CLASS SERVICE, INNOVATIVE TECHNOLOGY, IRS ACCEPTED

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- ✔ Corporate Actions, Splits, & Dividends

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
January 21, 2025

Trusts & Estates News

This week's Trust and Estate article is:
"Key Insights From The 59th Heckerling Institute On Estate Planning: Navigating The Future In 2025 And Beyond"

(Excerpt from actual article):
"As the estate planning landscape braces for significant changes in 2025, the 59th Annual Heckerling Institute on Estate Planning, held from January 13th to January 17th in Orlando, Florida, offered an indispensable guide for attorneys, advisors, and business owners. The conference highlighted the critical need for proactive planning considering a rapidly evolving tax and regulatory environment. Key topics included the anticipated sunset of the 2017 Tax Cuts and Jobs Act, the rising popularity of purpose trusts, and advanced business succession strategies."

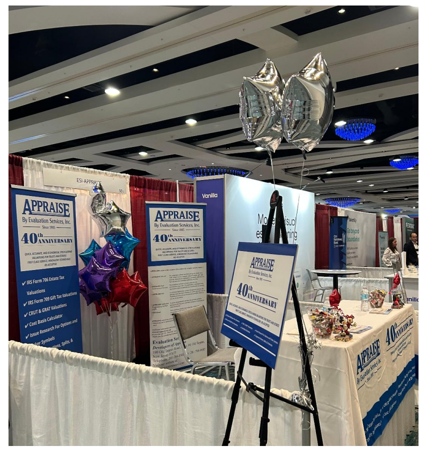
You can read the article by clicking **HERE**.

Last week's Trust & Estate article was:
"3 things we learned about estate planning in 2024"

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

Helpful Hint

This week's Helpful Hint is:
"Thank you for visiting us at the 2025 Heckerling Institute on Estate Planning"
We just returned from the 2025 Heckerling Institute on Estate Planning. We want to thank everyone who made time in their busy schedules to visit us. We had many engaging discussions, while learning from each other, and enhancing relationships. It is refreshing when we can meet in person.
Here is a picture of our booth to the right.



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

Last week's Helpful Hint was:
"Date of Death Valuations, Stock Splits, Adjusted, & Unadjusted Prices"

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**.

Upcoming Events

(Subject to change - please monitor regularly)

- **Wed, Jan 29:** (11:30a EDT) January webinar - **"*Estate & Gift Tax Valuations in the*

Cloud."

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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Evaluation Services, Inc.
180 OLD TAPPAN ROAD,
BUILDING 4, OLD TAPPAN, NJ
07675
(201) 784 8500
appraisenj.com

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