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40th ANNIVERSARY

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

- ✔ IRS Form 706 Estate Tax Valuations
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- ✔ Cost Basis Calculator
- ✔ Issue Research For Options and Ticker Symbols
- ✔ Corporate Actions, Splits, & Dividends

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
February 18, 2025

Trusts & Estates News

This week's Trust and Estate article is:
"9 Ways Your Estate Planning Strategy Should Change Under Trump"

(Excerpt from actual article):
"As President Donald Trump assumes the White House again, all eyes are on the tax changes his administration may try to pass that will impact estate planning. To explore the ways estate planning may change under a second Trump administration, experts suggested what you should know, and whether you should be making any plans now."

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

Last week's Trust & Estate article was:
"The Trump Administration's Estate Planning Proposals"

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

Helpful Hint

This week's Helpful Hint is:
"Do I have to manually enter securities or can I automate the process?"
Many of our clients who use our online services have upgraded from manually inputting CUSIP/Ticker and shares to having the fields populate automatically using our companion product, "**Universal Import**". It's faster and more accurate.**"**
You can watch a demonstation by clicking **HERE**.

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

Last week's Helpful Hint was:
"Please visit us at the 2025 American Bankers Association Wealth Management and Trust Conference!"

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

We explain the six ways we have for obtaining valuations from us in the **"Is there a better way to prepare your valuations?"** section of this eNewsletter. There are online and outsourcing services.

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, Feb 20:** (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.

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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