

# APPRAISE

By Evaluation Services, Inc.  
Since 1985

## 40<sup>th</sup> 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

✓ CRUT & GRAT Valuations

✓ Issue Research For Options and Ticker Symbols

✓ IRS Form 709 Gift Tax Valuations

✓ Cost Basis Calculator

✓ Corporate Actions, Splits, & Dividends

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter  
March 4, 2025

### Trusts & Estates News

This week's Trusts and Estates article is:  
**"4 Predictions For The Future Of AI In Estate Planning"**

(Excerpt from actual article):  
*"Here's how I see AI reshaping the estate planning landscape—making it smarter, more intuitive and deeply personal."*

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

Last week's Trust & Estate article was:  
**"Navigating the Form 706"**

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



---

### Helpful Hint

This week's Helpful Hint is:  
**"Share Splitter"**

One of our clients recently had a situation where the securities requiring valuation had to be split into three separate portfolios by percentages to complete an inheritance tax return. Our program,

"Share Splitter", automated this manual process improving accuracy and saving time.

If you have questions, you can [EMAIL US](#) for more information.

Last week's Helpful Hint was:  
"Alternate 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)

- **Wed, Mar 12:** (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.



---

## Six ways to get your valuations. Have it your way!

ESI-Appraise gives you six ways to get your estate, gift, and trust tax securities valuations. You don't have to fit into our workflow. We fit into yours. Have it your way!

1. **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.
2. **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.
3. **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.
  4. **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.
  5. **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.
  6. **Outsourcing:** Valuations can be submitted/delivered via email, fax, overnight courier, or mail.

## Are you the correct recipient of this eNewsletter?

Perhaps your coworker or colleague would benefit from the information contained in this eNewsletter. Please feel free to share it with them. They can then sign up for their own subscription by clicking on the link below.

[Sign up for ESI-APPRAISE notifications and weekly eNewsletters](#)

You can 'Safely Unsubscribe' by clicking on the link at the bottom of this eNewsletter.

Thank you for subscribing and allowing us to serve you.

---

### Evaluation Services, Inc.

180 OLD TAPPAN ROAD,  
BUILDING 4, OLD TAPPAN, NJ  
07675  
(201) 784-8500  
[newappraiseesi.com](http://newappraiseesi.com)

Contact Us



f Share This Email

X Share This Email

in Share This Email

Evaluation Services, Inc. | 180 OLD TAPPAN ROAD BUILDING 4 | OLD TAPPAN, NJ 07675  
US

[Unsubscribe](#) | [Constant Contact Data Notice](#)



Try email marketing for free today!