

"4 Predictions For The Future Of Al In Estate Planning"

You can read last week's eNewsletter by clicking <u>HERE</u>.

## **Helpful Hint**

This week's Helpful Hint is: "ESI-APPRAISE Help Center" The answers to many of the questions our clients ask can be found in the "Help Center" of our new website which you can get to by clicking <u>HERE.</u> These are accessible at any time. Take a look at all of the tabs as the information is grouped by header.

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

Last week's Helpful Hint was: "Share Splitter"

You can read last week's eNewsletter by clicking <u>HERE</u>.

#### 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 <u>HERE</u>.

# **Upcoming Events**

(Subject to change - please monitor regularly)

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

1 2 6 7 8 13 14 15 16 17 18 19 20 21 22 23 24 25 26 20 30

### 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. <u>APPRAISE.API</u>: 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. <u>APPRAISE.Web:</u> A web-based application, accessed through any browser, that

St Helpful hints





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. <u>APPRAISE.Software:</u> 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. <u>APPRAISE.SaaS</u>: 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. <u>ESI-Direct</u>: 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. <u>Outsourcing:</u> Valuations can be submitted/delivered via email, fax, overnight courier, or mail.

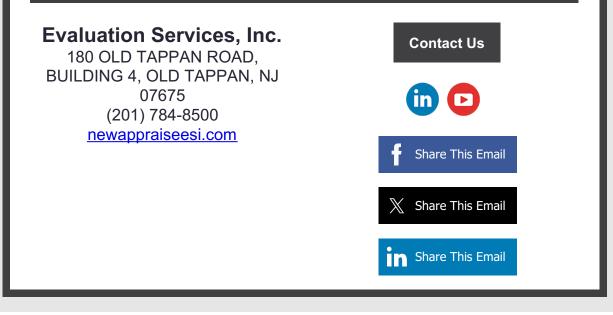
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