

# 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  
April 1, 2025

### Trusts & Estates News

This week's Trusts and Estates article is:  
**"What The Potential Elimination Of  
Step-Up In Basis Means For Families"**

(Excerpt from actual article):  
"Estate planning has long been about building and preserving wealth, minimizing taxes and smoothly transferring assets across generations. With the new administration in office, discussions around potentially eliminating the step-up in basis are gaining momentum. While this is by no means a sure thing, getting rid of the step-up in basis would bring challenges for families looking to pass down assets."

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

Last week's Trust & Estate article was:  
**"Setting the stage for open dialogue  
about estate planning: The role of  
family meetings"**

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



## Helpful Hint

This week's Helpful Hint is:

### "What is a composite price and what is a primary exchange?"

A composite price aggregates prices from multiple exchanges where the same security is traded. A primary exchange refers to the stock exchange which hosts a specific company's primary listing. A company's stock may be listed on one or more additional exchanges (secondary listings) in addition to its primary exchange.

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

Last week's Helpful Hint was:

### "APPRAISE API - Integrated Estate & Gift Tax 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)

- **Tue, Apr 3:** (4:00p EDT) System Maintenance - all online services will be unavailable with service being restored by 9:00p EDT.
- **Thu, Apr 10:** (4:00p EDT) System Maintenance - all online services will be unavailable with service being restored by 9:00p EDT.



## 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!

**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.

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