

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

✓ 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 8, 2025

Trusts & Estates News

This week's Trusts and Estates article is:
**"Turning Downturns Into Opportunity:
Recession-Era Strategies for Gift and
Estate Tax Planning"**



(Excerpt from actual article):
"When markets falter, many investors instinctively tighten their grip on their wealth, waiting for stability to return. But for high-net-worth individuals and families with long-term goals, a declining market is not merely a time to endure—it is a rare opportunity to act."

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

Last week's Trust & Estate article was:
**"What The Potential Elimination Of
Step-Up In Basis Means For Families"**

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

Helpful Hint

This week's Helpful Hint is:

"Gifts & GRATs"

Two of the strategies mentioned in this week's Trusts & Estates news article (see above) are gifts and GRATs. We can help you value the marketable securities for both of those situations.

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



Last week's Helpful Hint was:

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

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)

- **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!

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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