

APPRAISE

By Evaluation Services, Inc.

Since 1985

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

May 6, 2025

Trusts & Estates News

This week's Trusts and Estates article is:
**"Will of Former Zappos CEO Found
Years After His Death"**

(Excerpt from actual article):

"The will of late Tony Hsieh, the late CEO of Zappos, an online shoe and clothing retailer, has been found nearly 4 1/2 years after his untimely death in a New London, Conn. house fire. The will was mysteriously found this past February in the personal belongings of Pir Muhammad, a man who suffered from Alzheimer's and recently passed away, unaware that Tony had died."

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

Last week's Trust & Estate article was:
**"Clients aren't likely to face estate
taxes. But they still need a plan."**

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



Helpful Hint

This week's Helpful Hint is:

"Intercontinental Exchange (ICE) cannot provide valuations for its own bonds"

A client recently asked us why some ICE bonds, contained in a valuation, came back as unpriced? We advised them that ICE, who is our data vendor, legally cannot provide prices for their own evaluated issues so we directed them to the investor relations department at ICE. If you have questions, you can [EMAIL US](#) for more information.



Last week's Helpful Hint was:

"Stock Market Holidays 2025: Are NYSE and Nasdaq Open?"

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, May 22:** (5:00p EDT) System Maintenance - all online services will be unavailable with service being restored by 9:00p EDT.
- **Fri, May 23 (6:00p EDT) through Mon, May 26 (6:00 EDT):** System Maintenance - all online services will be unavailable.



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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