

APPRAISE

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40th ANNIVERSARY

QUICK, ACCURATE, AND ECONOMICAL STOCK & BOND VALUATIONS FOR TRUSTS AND ESTATES
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✓ Cost Basis Calculator

✓ Corporate Actions, Splits, & Dividends

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter

May 20, 2025

Trusts & Estates News

This week's Trusts and Estates article is:
"Art Investment and Estate Planning Strategies"

(Excerpt from actual article):

"The United States is the largest art market, accounting for 42% of global art sales. A survey found that although emotional value remains the key motivation, 41% of collectors surveyed said financial value was now the primary motivation for buying art."



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

Last week's Trust & Estate article was:
"Will of Former Zappos CEO Found Years After His Death"

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

Helpful Hint

This week's Helpful Hint is:
"Correctly valuing mutual funds for

estate tax when the valuation date falls on a weekend"

We've received a few questions lately regarding this situation. People are sometimes surprised we are only reporting the Friday price instead of the Monday and Friday prices they are expecting. Here is the IRS regulation we follow: **[IRS Reg. 20.2031-8(3)(b)]**

For open ended investment companies (commonly known as mutual funds) the fair market price is the public redemption price on the valuation date. Should no price be available for that date, the price used will be the price for the first day preceding the valuation date.

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



Last week's Helpful Hint was:
"Utility Program To Import Securities"

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:** (4:00p EDT) System Maintenance - all online services will be unavailable with service being restored by 9:00p EDT.
- **Fri, May 23:** (3:00p EDT) We are closing our support lines early for the Memorial Day weekend holiday. All online services will be available.



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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Evaluation Services, Inc.

180 OLD TAPPAN ROAD,
BUILDING 4, OLD TAPPAN, NJ
07675
(201) 784-8500
newappraiseesi.com

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