

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 27, 2025

Trusts & Estates News

This week's Trusts and Estates article is:
"Big GOP Tax Bill Could Change Your Estate Planning for 2025"

(Excerpt from actual article):
"The GOP might extend and increase the higher estate and gift tax exemption and AMT thresholds. What might this mean for your estate plan?"

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

Last week's Trust & Estate article was:
"Art Investment and Estate Planning Strategies"

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



Helpful Hint

This week's Helpful Hint is:
"What is a daily dividend fund and how to include daily dividends which are earned, but not yet paid, in your Appraise valuation"

A daily dividend fund is an investment in which dividends are earned each day and, generally, paid monthly.

To include the daily dividends which are earned, but not paid, you need to go into system setup and toggle accrue unpaid dividends to "Y".

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



Last week's Helpful Hint was:

"Correctly valuing mutual funds for estate tax when the valuation date falls on a weekend"

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](#).



Webinar: Six Efficient Ways to Get Your Estate & Gift Valuations

An April 2025 Wall Street Journal article stated, *"Every company I talk to is talking about productivity. How do we get our revenue per employee up, not just our revenue?"*

Our 30 minute webinar **"Six Efficient Ways to Get Your Estate & Gift Valuations"** will briefly introduce six ways you can get estate and gift valuations, all of which have the potential to increase efficiency and productivity.

The webinar is scheduled for **Wed, Jun 18 (11:30a - 12:00p EDT)**. You can register by clicking [HERE](#).

A graphic showing a green highlighter pen highlighting the word "Webinar" on a document. Below it, text describes a web-based seminar with live online educational pre-viewers, questions, slides, and interactive elements.

Webinar

Web-based seminar
live online educational pre-viewers can submit questions
see slides while the speaker
interactive elements - the a

Upcoming Events

(Subject to change - please monitor regularly)

- **Wed, Jun 18:** "Six Efficient Ways to Get Your Estate & Gift Valuations" webinar (see webinar section above)
- **Thu, Jun 19:** Juneteenth Day Holiday - the financial markets will be closed for the holiday. We will be closed as well.



Six efficient 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.

Are you the correct recipient of this eNewsletter?

Perhaps your coworker or colleague would benefit from the information contained in this eNewsletter. Please feel free to share it with them. They can then sign up for their own subscription by clicking on the link below.

[Sign up for ESI-APPRAISE notifications and weekly eNewsletters](#)


You can 'Safely Unsubscribe' by clicking on the link at the bottom of this eNewsletter.

Thank you for subscribing and allowing us to serve you.

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



 Share This Email

 Share This Email

 Share This Email

Evaluation Services, Inc. | 180 OLD TAPPAN ROAD BUILDING 4 | OLD TAPPAN, NJ 07675
US

[Unsubscribe](#) | [Constant Contact Data Notice](#)



Try email marketing for free today!