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
- ✔ IRS Form 709 Gift Tax Valuations
- ✔ CRUT & GRAT Valuations
- ✔ Cost Basis Calculator
- ✔ Issue Research For Options and Ticker Symbols
- ✔ Corporate Actions, Splits, & Dividends

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
June 3, 2025

Trusts & Estates News

This week's Trusts and Estates article is:
"How Technology Is Changing Wealth Management"

(Excerpt from actual article):
"Technology is rapidly transforming many industries, and wealth management is no exception. It has continued to reshape how individuals and institutions manage, grow, and protect their wealth. This evolution is breaking traditional barriers from financial planning tools to smart investment tools."

You can read the article by clicking **HERE**.

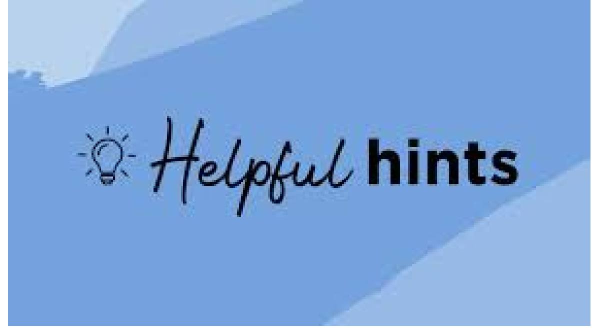
Last week's Trust & Estate article was:
"Big GOP Tax Bill Could Change Your Estate Planning for 2025"

You can read last week's eNewsletter by clicking **HERE**.

Helpful Hint

This week's Helpful Hint is:

"How Technology Is Changing Estate Valuations"
Similar to this week's Trusts and Estates article about technology's impact on wealth management, technology is also changing the ways people process estate valuations. To learn more about this, please consider registering for our June 18 webinar, "Six Efficient Ways To get your Estate & Gift Valuations." You can learn more in the Webinar section of this eNewsletter (two sections down).



If you have questions, or want more information, you can **EMAIL US**.

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

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**.

June 18 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.

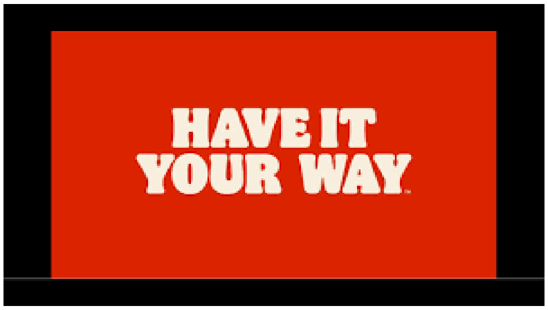
The webinar is scheduled for
Wed, Jun 18 (11:30a - 12:00p EDT).
You can register by clicking **HERE**.

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.

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