

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
June 17, 2025

Trusts & Estates News

This week's Trusts and Estates article is:
"12 States With the Highest Average Estate Tax Payments"

(Excerpt from actual article):

"The 30th annual IRS edition has it all: a chart showing when people's individual tax returns actually came in, a pie chart indicating how satisfied people said they were with IRS service, data on audits, and tables of state-by-state data on topics such as the number of tax returns that were filed and the amounts of various types of taxes that taxpayers actually paid."

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

Last week's Trust & Estate article was:
"Adequate disclosure on gift tax returns: A requirement for more than gifts"

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



Helpful Hint

This week's Helpful Hint is:

"WebAppraise with Alt Val Sales & Transactions"

We added alternate valuation date sales and transactions to webappraise, our web product for estate and gift tax valuations, and you can learn more about it by clicking [HERE](#).

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

Don't forget to take a look at our June 18 Webinar: **"Six Efficient Ways to Get Your Estate & Gift Valuations"** in the Webinar section of this eNewsletter.

Last week's Helpful Hint was:
"Gift Tax Regulations for Stocks & Bonds"

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](#).

A graphic showing a green highlighter pen writing the word "Webinar" in bold black letters on a white document. Below the word, there is some blurred text that appears to be a description of the webinar.

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.
- **Thu, Jul 3 (6:00p EDT) through Sun, Jul 6 (6:00P EDT):** Data center upgrade and online services will be unavailable.



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.

Evaluation Services, Inc.

180 OLD TAPPAN ROAD,
BUILDING 4, OLD TAPPAN, NJ
07675


(201) 784-8500

newappraiseesi.com

Contact Us



 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!