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

June 24, 2025

Trusts & Estates News

This week's Trusts and Estates article is:
"Battle over Jimmy Buffett's \$275 million estate highlights risks of family trusts"

(Excerpt from actual article):

"A court battle is brewing over Jimmy Buffett's \$275 million estate. The late singer's widow, Jane, and the co-trustee of the estate, Richard Mozenter, have filed lawsuits against one another. Attorneys said the Buffett case offers important lessons for families planning wealth transfers."

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

Last week's Trust & Estate article was:
"12 States With the Highest Average Estate Tax Payments"

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



Helpful Hint

This week's Helpful Hint is:

"What is a SEDOL number?"

The stock exchange daily official list (SEDOL) is a seven-character identification code assigned to securities that trade on the London Stock Exchange and various smaller exchanges in the United Kingdom. SEDOL codes are used for unit trusts, investment trusts, insurance-linked securities, and domestic and foreign stocks. SEDOL codes are comparable to CUSIP numbers, which are codes issued by the Committee on Uniform Securities Identification Procedures for stocks traded in the United States. (Source: Investopedia)



ESI-Appraise offers a broad range of global securities and related financial data from all major markets and exchanges.

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

Last week's Helpful Hint was:

"WebAppraise with Alt Val Sales & Transactions"

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, 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.

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