

APPRAISE

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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

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✓ Cost Basis Calculator

✓ Corporate Actions, Splits, & Dividends

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
July 8, 2025

Trusts & Estates News

This week's Trusts and Estates article is:
"10 Reasons To Reevaluate Your Estate Plan Following The 2025 Tax Law"

(Excerpt from actual article):
"The "One Big Beautiful Bill Act" (OBBBA) of 2025 introduces significant changes to estate and tax planning. While discussions often focus on high-net-worth families, these changes affect everyone, from young professionals to retirees. Since the law is so wide ranging, it can disrupt even the most well-prepared plans."

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

Last week's Trust & Estate article was:
"Battle over Jimmy Buffett's \$275 million estate highlights risks of family trusts"

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



Helpful Hint

This week's Helpful Hint is:

"We made a significant improvement to our primary data center over the holiday weekend"

We used the extended holiday weekend to make a significant improvement to our primary data center. Because of the increasing volume of valuations our clients are trusting us with, we had to replace our state of the art storage device with a larger and faster one. This was an extensive process which took three days to complete. The new device will serve our clients well now and into the future.



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

Last week's Helpful Hint was:
"What is a SEDOL number?"

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)

- None



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!

**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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