

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

Five quick, accurate, and economical ways to get your estate, gift, and trust tax valuations. Have it your way!

ESI-Appraise gives you five 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.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.
3. **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.
4. **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.
5. **Outsourcing**: Valuations can be submitted/delivered via email, fax, overnight courier, or mail.

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
July 22, 2025

Trusts & Estates News

This week's Trusts and Estates article is:
"Big Beautiful Bill: What Estate-Planning Steps Make Sense Now?"

(Excerpt from actual article):
"The One Big Beautiful Bill Act (OBBBA) is now law. While media attention has focused on the scores of income tax changes from liberalized qualified opportunity zones, qualified small business stock, expanded state and local tax deduction, research and development deductions, depreciation and more, the one change to the estate tax sounds pretty innocuous, but that may be deceptive."



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

Last week's Trust & Estate article was:
"Impact of New \$15M 'Permanent' Estate/Gift Tax Exemption"

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

Helpful Hint

This week's Helpful Hint is:
"What is a long coupon?"

A long coupon occurs when a bond is issued between two coupon payment dates and the issuer decides to skip the first coupon payment. Then, they provide a prorated amount for the next coupon payment. This means that the first payment is typically larger than the other payments. However, this shouldn't impact the total value of the bond because it is a prorated amount.



Example:

Date of Issue: August 5, 2023

Coupon Frequency: Semiannual

Coupon Payment Dates: Jan 1 & July 1

Instead of the first payment being shorter (August 5 - Jan 1 or 5 months), the first payment will be a prorated amount from August 5 to July 1 (11 months) and then future payments become normalized on the typical semiannual schedule.

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

Last week's Helpful Hint was:
"Did you know we archive our weekly newsletters?"

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



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