

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

In the Fall of 2024, PWC published the results of an [Asset and Wealth Management Survey](#), which shows how disruptive technologies are reshaping investor expectations, expanding the frontiers of innovation, and unlocking new, untapped markets.

Here is an excerpt:

"A remarkable 80% of the 264 asset and wealth managers we surveyed report that disruptive technology is fuelling revenue growth—nearly as many as those who observe improvements in operational efficiency. What's more, seven out of ten highlight the pivotal role of disruptive tech in driving product and service innovation, as these technologies transition from supporting back-office functions to playing a more prominent role in customer interactions."



ESI-APPRAISE unleashes the transformative power of disruptive technology with five quick, accurate, and economical ways to integrate estate, gift, and trust tax valuations into your wealth management and estate settlement ecosystems.

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:** 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. Portfolios are stored on your computer.
3. **Web Appraise:** 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 our online order form.

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

August 19, 2025

Trusts & Estates News

This week's Trusts and Estates article is:
"What Wealthy Families Can Learn From a Rock Star's Estate"

(Excerpt from actual article):
"Osbourne left behind his widow, Sharon, and six children from two marriages. With an estate reportedly worth \$230 million and future royalties at stake, experts say, the potential for tension behind the scenes is all too real. Just consider the case of Jimmy Buffett, whose estate is embroiled in litigation between his wife and longtime business manager."

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

Last week's Trust & Estate article was:
"Frequently Asked Questions for tax professionals: The One Big Beautiful Bill Act"

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



Helpful Hint

This week's Helpful Hint is:
"ESI-Direct & Common Asset List"

[ESI-Direct](#) is an add-on stock and bond valuation service developed in partnership with Thomson Reuters as part of their ONESOURCE Trust and Estate Administration (OTEA) software. No secondary software installation is required, only an account number for logging into the ESI-Direct partition of the OTEA program. This allows users to get ESI's accurate valuations using their saved ONESOURCE assets. This saves time importing valuations over from our Appraise. It is all done in one program, bringing convenience directly to you and improving your productivity!

ESI-Direct can also be bundled with a Common Asset List which includes thousands of issues that can be imported



into FAS & 706. This feature can greatly reduce the amount of time spent entering original assets, subsequent assets, and purchase entries.

Why don't you give us a try with one of your trust, estate, or gift tax valuations? Please call us at 201-784-8500 x111 or [EMAIL](#) us.

Last week's Helpful Hint was:
"We can price options"

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)

- **Fri, Aug 29:** (3:00p EDT) We are closing our support lines early for the Labor Day weekend holiday. All online services will be available.



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