

# APPRAISE

By Evaluation Services, Inc.  
— Since 1985 —

## 40<sup>th</sup> 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

September 2, 2025

### Trusts & Estates News

This week's Trusts and Estates article is:

#### **"Key Considerations of AI in Asset and Wealth Management"**

(Excerpt from actual article):

*"Artificial intelligence is revolutionizing the financial advisory landscape by augmenting human advisors with powerful data analysis capabilities. Asset managers and family wealth advisors have traveled a long way from their early experiments with ChatGPT. They're now beginning to realize the potential of AI to enhance investment decisions, automate operations and deliver personalized client experiences. These technologies enable advisors to spend less time on routine analysis and more time building meaningful client relationships. But AI opportunities come with unique risks, especially when it comes to data privacy and security, as well as regulatory and legal compliance."*

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

Last week's Trust & Estate article was:

#### **"Will Hulk Hogan's Estate Bring the Drama?"**

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



### Helpful Hint

#### **This week's Helpful Hint is: "Pricing Securities Using Ticker Symbols"**

Appraise users can use either CUSIP numbers, SEDOL numbers, or ticker symbols to price securities. If the symbol has a PR (preferred issue) in it, for example BAC.PRM, then enter it as BAC.M"



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:  
**"Uploading a spreadsheet of holdings  
into webappraise for efficiency gains"**

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

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## 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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