

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

September 9, 2025

Trusts & Estates News

This week's Trusts and Estates article is:
"Estate Tax Relief And Long-Term Care"

(Excerpt from actual article):

"After facing the threat that more of their wealth could have been caught in the net of estate taxes, your wealthy clients likely recently breathed a big sigh of relief. The One Big Beautiful Bill Act not only preserved larger exemptions for how much wealth can pass through free of estate taxes—but those exemptions are also set to rise from the current \$13.61 million dollar level.

Could there be any downside to this good news? In fact, there is. Just ask those of us who work in the long-term-care space. To us, the large exemptions, even though they might seem like a golden ticket, could actually give many clients a false sense of comfort—and even foster denial—about what they are going to need for long-term-care planning, and this denial could affect their financial advisors, too."

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

Last week's Trust & Estate article was:
"Key Considerations of AI in Asset and Wealth Management"

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



Helpful Hint

This week's Helpful Hint is:
"Transactions between the date of death and alternate valuation dates."

If you prepare alternate valuations which have transactions between the date of death and alternate date, Appraise allows you to input 17 unique types. For example, you can enter exchanges, mergers, sales, and spin offs.



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:
"Pricing Securities Using Ticker Symbols"

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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