

# 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

### "Industry News, Helpful Hint, & Upcoming Events" eNewsletter September 23, 2025

#### Trusts & Estates News

This week's Trusts and Estates article is:  
**"WealthManagement.com Celebrates  
Top Companies, Executives at 2025  
Industry Awards"**

(Excerpt from actual article):  
*"Judges recognized companies for their  
outstanding support of financial advisor  
success in various categories from  
among nearly 300 finalists."*

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

Last week's Trust & Estate article was:  
**"Shifting Estates from 'Leave On' to  
'Live On'"**

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



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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."*



**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 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. 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.

## Helpful Hint

**This week's Helpful Hint is:**  
**"Do you use Composite or Primary Exchange Pricing?"**

Evaluation Services, Inc. uses composite exchange pricing for all valuations whether through our software offerings or Appraise Outsourcing service. There are a few reasons we have chosen to use composite exchange pricing as our default methodology.

1. Stock exchanges may prefer composite prices for a broader, more accurate market view across venues, especially in fragmented markets.  
**(Intercontinental Exchange)**
2. Composite pricing data provides best prices (open/high/low/last) from their respective primary and regional exchanges because they include primary and regional exchanges.  
**(London Stock Exchange Group)**
3. Historically, composite prices match what our clients' clients see on brokerage statements and websites.



Last week's Helpful Hint was:

## "Inverse Weighting"

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

Need a trusted partner for your trust, estate, or gift tax valuations?

Let **Evaluation Services Inc. (ESI-APPRAISE)** simplify the process for you. ☐

Call us at [201-784-8500 x111](tel:201-784-8500) or ☐ [Email us](#) today.

Stay informed—follow us on [LinkedIn](#) for quick insights and news.

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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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