

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

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

September 30, 2025

Trusts & Estates News

This week's Trusts and Estates article is:
**"The Estate Planning Blind Spot:
Protecting Your Digital Legacy"**

(Excerpt from actual article):

"Americans increasingly live their lives online, storing everything from bank records to family photos in the cloud. Banking apps, retirement portals, iCloud photo libraries, and business websites, all of these accounts hold financial, personal, and sentimental value. Yet most estate plans do not account for this modern form of property, with less than 15% of Americans having an estate plan that addresses digital assets. Digital estate planning is a crucial growing area of planning in this digitalized world."

You can read the article by clicking [HERE](#). If the page does not render, please send us an email, and we will send you a PDF.

Last week's Trust & Estate article was:
**"WealthManagement.com Celebrates
Top Companies, Executives at 2025
Industry Awards"**

You can read last week's eNewsletter by



clicking [HERE](#).

Helpful Hint

This week's Helpful Hint is:
"Customize Your Valuations with the Global Asset List"

Need to include a user-defined asset in your valuation? [Web Appraise](#) makes it easy with the Global Asset List feature! This powerful tool lets you define custom assets using your own identifiers and prices. Once saved, Web Appraise automatically generates a 9th check digit, making your asset valid for use across the platform. This keeps your workflow smooth and consistent. Common examples of this include cash assets and foreign currency (entered as the converted USD value).

The process is outlined in one of our Help Center tutorials, [How do I create a manual entry for a portfolio in Web Appraise? | Evaluation Services, Inc.](#)

Last week's Helpful Hint was:
"Do you use Composite or Primary Exchange Pricing?"

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



Upcoming Events

(Subject to change - please monitor regularly)

- None.



Is there a better way to prepare your estate valuations?

Why don't you consider us for your stock and bond valuations for estates, gifts, and trusts? **Maybe there is a better way than how you are doing them now?**

We've been providing these valuations since 1985 and have experience and insight. Our pricing universe contains millions of



US and foreign securities with corresponding decades of history. We can speak with you to potentially identify ways to improve [operational efficiency](#).

1. Secure online solutions (You do the work and save money.):

- **[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.
- **[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.
- **[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.
- **[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.

2. Outsourcing solution (We do the work and save you time.):

- Valuations can be submitted/delivered via email, fax, overnight courier, or mail. Click [HERE](#) for an order form.

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

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