

APPRAISE

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Since 1985

40th ANNIVERSARY

QUICK, ACCURATE, AND ECONOMICAL STOCK & BOND VALUATIONS FOR TRUSTS AND ESTATES
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"Industry News, Helpful Hint, & Upcoming Events" Newsletter

October 7, 2025

Trusts & Estates News

This week's Trusts and Estates article is:

"Giorgio Armani's Will Contains Surprises Regarding His Fashion Empire"

(Excerpt from actual article):

"The will of iconic fashion designer and billionaire Giorgio Armani, who passed away earlier this month at 91, has been made public."

You can access the article by clicking [HERE](#), or view the [PDF](#) version attached for your convenience.

Last week's Trust & Estate article was:

"The Estate Planning Blind Spot: Protecting Your Digital Legacy"

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



Who is our data provider?

At ESI – Appraise, we ensure the highest level of accuracy in our **securities valuation** by exclusively utilizing data from the Intercontinental Exchange(ICE), a leading U.S.-based provider. This data is sourced and meticulously processed within the United States, guaranteeing reliability and integrity in our valuation process.



Visit our [FAQ](#) page for more information.

Last week's Helpful Hint was:

"Customize Your Valuations with the Global Asset List"

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

Upcoming Events

(Subject to change - please monitor regularly)

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.

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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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