

APPRAISE

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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 14, 2025

Trusts & Estates News

This week's Trusts and Estates article is:
"Capital gains, standard deductions, and tax brackets changes offer planning opportunities."



(An Excerpt from an actual article):
"The IRS has announced its 2026 inflation adjustments, affecting over 60 tax provisions such as income tax brackets and estate exclusions, as outlined in Revenue Procedure 2025-32. These adjustments reflect changes from the recent One Big, Beautiful Bill (OBBB). For Registered Investment Advisers (RIAs) and their clients, the 2026 tax year is a key time to reassess withholding, charitable giving, and estate strategies in light of new deductions and thresholds."

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

Last week's Trust & Estate article was:
Giorgio Armani's Will Contains Surprises Regarding His Fashion Empire"

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

This week Helpful Hint:

When should we avoid sending the portfolio for pricing?

Please avoid running the portfolio for pricing between Saturday 8:00 PM EDT and Sunday 8:00 AM EDT, as Intercontinental Exchange (ICE)—our data provider—is offline during that time.

Last week's Helpful Hint was:

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.



Upcoming Events - NONE

(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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