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
- ✔ IRS Form 709 Gift Tax Valuations
- ✔ CRUT & GRAT Valuations
- ✔ Cost Basis Calculator
- ✔ Issue Research For Options and Ticker Symbols
- ✔ Corporate Actions, Splits, & Dividends

"Industry News, Helpful Hint, & Upcoming Events" Newsletter
October 21, 2025

Trusts & Estates News Article:

Giving While Living: A Thoughtful Shift in Wealth Transfer

As families rethink traditional inheritance timelines, a growing number are embracing "**giving while living"** — supporting children and grandchildren with education, housing, or business ventures during their lifetimes.
Wealth managers like Jody King, Chris Maudlin, and Bill Ringham are guiding clients through this nuanced process, balancing generosity with long-term financial security.
As Maudlin articulates,:

- "It's a balance between generosity and prudence — and we underscore that maintaining financial independence should remain their primary objective.".
- Their insights on tax-efficient strategies, family harmony, and legacy planning are invaluable in navigating this evolving landscape.

Thank you to these experts for sharing their wisdom and helping families make informed, compassionate decisions.
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:
"Capital gains, standard deductions, and tax brackets changes offer planning opportunities."

You can read last week's Newsletter by clicking **HERE.**

This week Helpful Hint:

Can a Portfolio ID be renamed after creation in **Appraise**?
Yes, using the Copy Portfolio feature, you can duplicate the portfolio and update the Portfolio ID, Estate Name, and Valuation Date. Then, delete the original to keep your workspace streamlined.
This reflects our commitment to user-centric design, providing professionals with the flexibility to manage valuations efficiently.

Last week's Helpful Hint was:

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.

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** or **Email us** today.
Stay informed—follow us on **LinkedIn** for quick insights and news.

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.

Are you the correct recipient of this Newsletter?

Know someone who might benefit from the insights in this Newsletter? Feel free to share it with them! They can subscribe directly by clicking the link below

Sign up for ESI-APPRAISE notifications and weekly Newsletters

You can 'Safely Unsubscribe' by clicking on the link at the bottom of this Newsletter.

Thank you for subscribing and allowing us to serve you.

Evaluation Services, Inc.
180 OLD TAPPAN ROAD,
BUILDING 4, OLD TAPPAN, NJ
07675
(201) 784-8500
Evaluation Services, Inc. - Historical Stock and Bond Valuations for Trusts and Estates

Contact Us