

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
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- ✓ 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" Newsletter
November 3, 2025

Trusts & Estates News Article:



□ "The Next Generation Will Demand Digital Estate Planning from Day One"

by **Cody Barbo**, cofounder of Trust & Will, published on Forbes:

Estate planning used to be something you didn't think about until you were gray-haired, married, and living behind a white picket fence. But for Millennials and Gen Z, that world no longer exists. We're delaying traditional milestones, building wealth differently, blending families, and conducting most of our lives online. So why should one of life's most important financial and legal decisions—how we protect our family, our assets, and our legacy—still feel like it's stuck in a 1990s law office?

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:

[Estate Tax Filing Mistake Can Cost Clients Millions](#)

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

 *Helpful* **hints**

This week's Helpful Hint:

Can you add assets to a portfolio after it is priced?

Yes. After a portfolio is priced, the status column will no longer say 'unpriced'. Only newly added unpriced securities are sent for pricing and incur a cost.

Last week's Helpful Hint was: **How to Enter Preferred Stock Tickers in Appraise for Valuation**

If the preferred stock ticker contains "PR", replace "PR" with a period (.) to match Appraise's preferred issue ticker format.

Example:

- Company: Allstate
- Standard Ticker: ALL
- Preferred Stock Ticker: ALLPRJ
- Appraise-Compatible Ticker: ALL.J

☐ Correct Entry for Appraise: ALL.J

This formatting ensures Appraise recognizes and values the preferred stock correctly.

Upcoming Events: None.

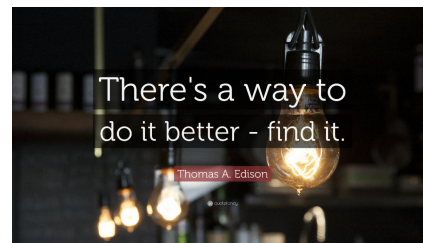
Note: Avoid running the portfolio for pricing between Saturday at 8:00 PM Eastern and Sunday at 8:00 AM Eastern, as the Intercontinental Exchange (ICE), our data provider, is offline during that time.

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.

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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