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QUICK, ACCURATE, AND ECONOMICAL STOCK & BOND VALUATIONS FOR TRUSTS AND ESTATES
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- ✓ Cost Basis Calculator
- ✓ Corporate Actions, Splits, & Dividends

"Industry News, Helpful Hint, & Upcoming Events" Newsletter
Dec 2, 2025

Trusts & Estates News Article:



4 Celebrity Estate Battles We Can All Learn From

The article, "4 Celebrity Estate Battles We Can All Learn From," discusses how successful estate planning is crucial, especially for wealthy and public figures, not just for tax reasons but also to maintain peace among heirs and stakeholders.

Read the entire article by clicking [here](#). The [PDF](#) copy is attached for your convenience.

Last week's Trust & Estate article was:

Overhauling Older Estate Plans After the OBBBA

The passage of the One Big Beautiful Bill Act necessitates a review of estate plans. Key considerations include the main changes in estate planning, the potential ineffectiveness of older plans—especially those with credit shelter trusts—the impact on "basis step-up" and capital gains, and the actions families or advisors should take now. Additionally, it's important to be aware of the risks or uncertainties surrounding estate tax laws as these changes unfold.

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

 Helpful hints

This week's Helpful Hint:

Using DRiP-Integrated Cost Basis Calculator, we can determine an investment's value by using the original purchase data (date and number of shares) and all dividend reinvestment activity to compute the adjusted cost basis and account valuation on any chosen date.

Last week's Helpful Hint was:

What is an ISIN number?

An International Securities Identification Number (ISIN) is a 12-digit alphanumeric code that uniquely identifies a specific security. Each country's National Numbering Agency (NNA) allocates ISINs.

Unlike ticker symbols, which are used at the exchange level, ISINs are universally recognized identifiers for securities. They facilitate clearing and settlement and ensure consistent tracking of institutional investors' holdings across global markets.

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.

Upcoming Events:

- Wed, Dec 24: The NASDAQ & NYSE exchanges are closing at 1:00pm ET for Christmas Eve. Our Customer Service / Technical / Client Support will be closing at 1:00pm ET as well. All online systems will be available.
- Office Closed on Thursday, Dec 25, 2025 Christmas day, align with Market.
- Wed, Dec 31: Our Customer Service / Technical/ Client Support will be closing at 2:00p ET for the New Years Eve. All online systems will be available.

Join Us at the 2026 Heckerling Institute on Estate Planning!

We're excited to exhibit at the upcoming Heckerling Institute on Estate Planning. Be sure to stop by booth #501, conveniently located across from the registration desk.

We're thrilled to kick off our 41st anniversary on January 1, 2026!

This milestone reflects our unwavering commitment to quality service, continuous improvement, and innovation. As we move forward, we're excited to share updates, insights, and initiatives that embody our vision of **Empowering Efficiency Through Innovation**. Join us as we celebrate this journey and look ahead to an even brighter future together!

60TH ANNUAL HECKERLING
INSTITUTE ON ESTATE PLANNING
January 12 - 16, 2026
Orlando World Center Marriott Resort and Convention Center



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Visit us at Booth #501 (Right across from the Registration Desk)

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

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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.):

1. **APPRAISE.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.
2. **APPRAISE.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.
3. **APPRAISE.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.
4. **APPRAISE.SaaS:** Software as a Service (SaaS) means we host the software, which you access via the internet, and you store your data locally on your computer. This benefits you and your information technology group because a hybrid solution takes the best of software and web and combines them. You're always running the current version and do not need to install updates. Your portfolio data is stored securely on your computers. It's easy to add and remove users. The underlying technology is Citrix.
5. **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.

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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