APPRAISE
By Evaluation Services, Inc.
Since 1985

Fast, Accurate, Easy and Economical
Historical Stock & Bond Valuations for Trusts & Estates
✓ First Class Service ✓ Innovative Technology ✓ IRS Accepted

"Industry News & Helpful Hint" Newsletter

June 16, 2026

Trusts & Estates news article of the week:
"After OBBBA, Some Wealthy Clients Have Estate Planning Regrets"

Extract: The federal estate and gift tax exemption of $13.99 million per individual was scheduled to sunset at the end of 2025.

But with last summer's passage of the One Big Beautiful Bill Act, the exemption was raised to $15 million, made permanent, and adjusted annually for inflation.

Some clients who rushed to give assets to children before the deadline may be having second thoughts, given this change. But, experts say, it may be too late for many of them unless they built flexibility into the structure of a trust.

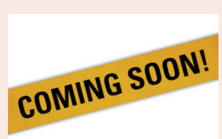
Read the entire article by clicking **HERE**.

Helpful hint of the week:
"CUSIP numbers Reserved for Internal Use"

Issuer identifiers (990 to 999 and 99A to 99Z in each group of 1,000 numbers) have also been reserved for the user's own purpose. This permits a user to assign an issuer identifier to any issuer which might be relevant to their holdings but which does not qualify for coverage under the CUSIP system. Other issuer identifiers (990000 to 999999 and 99000A to 99999Z) are also reserved for the user so that they may be assigned to non-security assets or for other internal operating purposes.

For any questions, please email us @clientinfo@appraisenj.net

Coming Soon:
"A New Version Of WebAppraise"



If you are looking for a cloud/web application for your estate, gift, and trust tax valuations, **WebAppraise** is worth a look. Although the product has been available for some time, **we will release an updated version in July 2026.** This iteration will enhance some existing features and include a few additional ones. Some of these include:

1. The ability to save portfolios in the "cloud" or on premises.
2. The ability to add sales and other transactions to alternate date of death valuations.
3. The ability to import assets to be valued from a CSV (comma-delimited) or Excel file.

Last week's Trusts & Estates news article:
"Estate Planning Still Remains Overlooked By Many"

Last week's Helpful Hint:
"Activation Pin"

Read more HERE

Notes:
Fri, Jun 19 is the Juneteenth holiday and the financial markets will be closed. Our office will be closed as well. We will be performing system maintenance and pricing services will be intermittently unavailable.

Avoid sending portfolios for pricing between Saturday at 8:00 PM and Sunday at 8:00 AM Eastern Time. Intercontinental Exchange (ICE), our data provider, is offline during that time for maintenance.

4. The ability to export the valuation results to a CSV (comma-delimited), Excel, or PDF file.
5. The ability to process bigger portfolios.
6. Multi-factor authorization and Single Sign On

For any questions, please email us @clientinfo@appraisenj.net

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.

Our vision is **"Transforming Trust & Estate Valuations Through Innovation",** providing flexibility and choice to each client. That's why we offer six distinct ways to obtain IRS-compliant valuations, ensuring the perfect fit for your firm's size, technical capabilities, and risk profile. No other provider offers this level of versatility.

We invite you to explore our solutions, and discover how ESI can help you streamline your processes while maintaining accuracy and compliance.

Category	Solution(s)	Values
Enterprise & Automation Ideal for large-scale operations.	1.**Appraise API**	1.Scalable Automation. Secure system-to-system data transfer. No manual process.
Convenience & Integration ideal for cutting infrastructure costs.	2.**Web Appraise** 3.**ESI-Direct** *No IT overhead or manual updates.	2. Secure access from anywhere. 3. Platform integration with ONESOURCE Trust and Estate Administration software.
Specialty & Risk Mitigation Ideal for reducing risk exposure.	4.**Appraise Outsourcing** 5.**Appraise (Desktop)** 6.**Appraise SaaS** *Requires IT involvement to manage third-party Citrix software	4.Expert service and quality assurance. 5.Mitigates risk by saving files locally. 6.The combined convenience of the web and the risk mitigation of software.

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

Visit our Website

(201) 784-8500
Office hours: 09:00 am - 05:00 pm Eastern Time
We follow the NYSE & NASDAQ holiday schedule

Evaluation Services, Inc. - Historical Stock and Bond Valuations for Trusts and Estates

LinkedIn for quick updates & helpful hints

YouTube for product demos

Our Company Contact Us

Evaluation Services Inc. | 180 OLD TAPPAN ROAD BUILDING 4 | OLD TAPPAN, NJ 07675 US