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

July 14, 2026

Trusts & Estates news article of the week:
"The sandwich generation is forcing advisors to rethink the 60/40 portfolio"

Extract: Tim Thornberry, financial planner at Prudential Advisors and founding partner of Cornerstone Financial Partners, says estate planning work used to center on transfer at death. Now, he says, most of the real money moves during life — and unless that support is built in as a known obligation from the start, it quietly erodes the client's own retirement security.

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

Helpful hint of the week:
"Correctly valuing mutual funds for estate tax when the valuation date falls on a weekend"

We've received a few questions lately regarding this situation. People are sometimes surprised that we are only reporting the Friday price instead of the Monday and Friday prices they expect.

Here is the IRS regulation we follow: ***[IRS Reg. 20.2031-8(3)(b)]***
"For open-ended investment companies (commonly known as mutual funds), the fair market price is the public redemption price on the valuation date. Should no price be available for that date, the price used will be the price for the first day preceding the valuation date."

You can see all of the IRS regulations we utilize by clicking **HERE**.

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

Coming Soon:
"WebAppraise v2.1 coming Aug 3"

If you are looking for a 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, 2.1, on August 3 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 our proprietary data center or on your premises.
2. The ability to add sales and other transactions to alternate date of death valuations.

Last week's Trusts & Estates news article:
"Estate Planning for Later-in-Life Marriages"

Last week's Helpful Hint:
"Have you looked at the NEWS section of our website?"

Read more HERE

Notes:

Mon, Aug 3: We will be doing system maintenance from 9:00 a.m. to 11:00 a.m. EDT and there may be service interruptions.

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.

3. The ability to import assets to be valued from a CSV (comma-delimited) or Excel file.
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

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Need a trusted partner for your estate, gift, or trust 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 Estate & Trust 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.

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