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

August 25, 2026

Trusts & Estates news article of the week:
"The Buss Children Are Squabbling Over Their Remaining Lakers Stake"

Extract: When Lakers majority owner Jerry Buss died in 2013, he left his 66 percent stake to six of his children, with daughter Jeanie Buss acting as the team's governor. Jerry hoped his family would hold on to the franchise, and toward the end of his life, he took financial and contractual measures that made it easier for them to do so. Naturally, after his death these six Buss children got caught up in over a decade of infighting that saw them split into three rough camps.

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

Helpful hint of the week:
"Accrued Dividends For Mutual Funds"

We recently asked why we did not include dividends for some mutual funds for which we generated date-of-death valuations when dividends were appearing on the mutual fund website.

The answer was: "The data in your report is in line with the applicable **IRS Regulations** based on the ex-dividend, record, and pay dates for each asset."

If you have questions, please email us: **clientinfo@appraisenj.net**

Move Beyond Desktop Software: Flexible Deployment for Estate Valuations

We've been helping financial institutions modernize estate valuation operations. While many organizations still rely on traditional desktop software, we've built a **web-based platform** that lets firms deploy it in our secure data center or in their own infrastructure, meeting any governance standard.
For estate settlement teams, this means:

- Easier, browser-based access for authorized users
- Zero reliance on local desktop installations and reduced IT overhead

Last week's Trusts & Estates news article:
"Nike's Founder Has Moved $9 Billion to His Heirs and the Gift-Tax Bill Was Roughly $0. The Trust He Used Has a Name and It's Legal in All 50 States"

Last week's Helpful Hint:
"ESI-Appraise GRAT valuations"

Read more HERE

Notes:
Fri, Sep 4:
Our office will be closing at 3:00 p.m. Eastern Time for the Labor Day holiday weekend. We will Tue, Sep 8 9:00 a.m.

Online services are always available except during scheduled maintenance (see below).

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.

- Automatic updates and a consistent experience across all offices
- Full alignment with internal risk management and security standards

We'd welcome the opportunity to learn how your team currently manages estate valuation workflows and to share how other institutions use WebAppraise to improve efficiency while maintaining strict controls.

If there appears to be a fit, would you be open to a brief conversation sometime in the next few weeks?

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

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 x113** 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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