

"Industry News & Helpful Hint" Newsletter

September
1, 2026

Trusts & Estates news article of the week:
"The Estate Tax Sunset Didn't Happen—Don't Assume You're In The Clear"

Trusts & Estates

Extract: I've noticed a dangerous side effect of that good news: relief. Many high-net-worth families have concluded that estate tax planning is no longer urgent, or no longer relevant to them at all. For most, that's true at the federal level. But it overlooks something the federal law never touched.

Read the entire article by clicking [HERE](#).

Last week's Trusts & Estates news article:
"The Buss Children Are Squabbling Over Their Remaining Lakers Stake"

Last week's Helpful Hint:
"Accrued Dividends For Mutual Funds"

[Read more HERE](#)

Helpful hint of the week:
"No special deals, just honest pricing"

Appraise
Helpful hint 

We hold our business practices to the same standard of accuracy and consistency as our valuation reports. By providing open, upfront pricing across all our services, Evaluation Services, Inc. ensures that our clients receive exceptional value and full transparency at every stage of the valuation process.

You can get to our fee schedule by clicking [HERE](#).

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

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

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

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
- Automatic updates and a consistent experience across all offices



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.

- 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](mailto:clientinfo@appraisenj.net) 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
<u>Enterprise & Automation</u> Ideal for large-scale operations.	1.Appraise API	1. Scalable Automation. Secure system-to-system data transfer. No manual process.
<u>Convenience & Integration</u> 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.
<u>Specialty & Risk Mitigation</u> 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

(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**

Visit our Website

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

[Unsubscribe](#) | [Constant Contact Data Notice](#)



Try email & social marketing for free!