

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
<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.

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Thank you for subscribing and allowing us to serve you.

Evaluation Services, Inc.

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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**

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