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Transforming Estate, Gift, & Trust Valuations Through Innovation

"Industry News & Helpful Hint" Newsletter

October 13, 2026

Trusts & Estates news article of the week:
"Dolly Parton estate drama shows limits of even careful planning"



Extract: Dolly Parton spent years building a trust structure for her estate. Less than a month after her death in late August, that estate was in court.

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

Helpful hint of the week:
"Why we are unable to value annuities"



Unfortunately, we cannot value annuities primarily because these funds are not publicly traded and rely on internal insurance carrier accumulation unit values (AUVs) rather than open market trading.

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



We will be exhibiting at the 2027 Heckerling Institute on Estate Planning in Orlando from January 11 to 153. Our booth (#501) is in the same place as in past years, right next to the registration area, and across from the walkway to the sessions.

You may already be a client or know us from our weekly **"Industry News & Helpful Hint" eNewsletter**.

Personally, we appreciate the opportunity to meet our clients, friends, and subscribers. Professionally, the institute provides a forum for us to discuss the valuations we provide and the technology we use to deliver them.

Last week's Trusts & Estates news article:
"IRS finalizes increase in estate tax closing letter fee."

Last week's Helpful Hint:
"Questions regarding Web Appraise v2.1"

Read more HERE

Notes:

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.

Please stop by our booth for a short conversation to see if we can help you with your trust and estate valuations. Maybe there is a better way!

Need a trusted partner for your estate, gift, or trust tax valuations?
Let **Evaluation Services Inc. (ESI-APPRAISE)** simplify the process.
📞 Call us at **201-784-8500 x113** or **Email us** today.

Our vision is **"Transforming Estate, Gift, & Trust Valuations Through Innovation."** Providing each client with flexibility and choice. **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 with zero manual processes.
Convenience & Integration Ideal for cutting infrastructure costs.	2.Web Appraise 3.ESI-Direct	2. **Data Control Flexibility:** Choose to store trust and estate portfolios in our secure private cloud or directly within your firm's own infrastructure (on-premises). Eliminates IT overhead and manages risk. 3. **Native Software Integration**: Direct, seamless integration with ONESOURCE Trust and Estate Administration software. No manual file exports/imports needed.
Specialty & Risk Mitigation Ideal for reducing risk exposure.	4. Appraise Outsourcing 5. Appraise Software 6. Appraise SaaS *Requires IT involvement to manage third-party Citrix software	4. **Turnkey Expert Service:** Complete quality assurance where our team handles the valuation work for you. 5. **On-Premises Local Control:** Full local data control that mitigates risk by storing files directly on local network servers. 6. **Hybrid Convenience & Risk Mitigation:** Combines the browser accessibility of the web with robust enterprise-level risk mitigation.

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