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By Evaluation Services, Inc.
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Fast, Accurate, Easy and Economical
Historical Stock & Bond Valuations for Trusts & Estates
✓ First Class Service ✓ Innovative Technology ✓ IRS Accepted

"Industry News & Helpful Hint" Newsletter

October 27, 2026

Trusts & Estates news article of the week:
"How Higher Interest Rates Could Change Your Estate Tax Strategy"



Extract: Significant increases in interest rates and long-term Treasury yields this year are altering the tax benefits of common estate-planning strategies.

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

Helpful hint of the week:
"When to use a CUSIP, ISIN, or SEDOL number"



If the CUSIP is listed in the U.S. or Canadian market and the security is actively trading, the price will be returned. If the security is not trading, we will not return a price. For securities in other markets, you will need to use the SEDOL or the ISIN listed in those markets to retrieve pricing data.

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

Last week's Trusts & Estates news article:
"The Next Generation of Affluent Americans Are Reshaping Giving"

Last week's Helpful Hint:
"Bond prices on the Columbus Day holiday?"

Read more HERE

News:
We will perform system maintenance on Friday, October 30 in the afternoon and service will be interrupted. You can view the announcement on our website by clicking **HERE**.

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.

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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