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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

November 3, 2026

Trusts & Estates news article of the week:

"'Nobody prepared them': The ultrawealthy worry wealth will dull their heirs' 'drive and desire' and so some aren't telling them how much there is"



Extract: For the ultrawealthy, preparing children to inherit their fortunes is a long process that is much more than just transferring assets. The responsibility of managing their fortunes given to the younger generation has become a point of concern for the wealthiest families as they age—some are keeping the full amount from them.

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

Helpful hint of the week:

"Web Appraise v2.1.0 New Feature Summary"



We announced on August 3 that we had upgraded our Web Appraise service. Since August is a month when people take time off, we thought now would be a good time to review the existing and new features that make Web Appraise a powerful tool for estate, gift, and trust tax valuations.

You can review all of these powerful features by clicking **HERE**.

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

Upcoming Events:



- **Wed, Nov 25:** Evaluation Services Customer Service / Technical Support will be closing at 2:00 p.m. Eastern Time for the Thanksgiving Holiday. All online systems will be available.
- **Thurs, Nov 26:** Office is closed for the Thanksgiving holiday.
- **Fri, Nov 27:** The NASDAQ & NYSE exchanges are closing at 1:00 p.m. Eastern Time. Evaluation Services Customer Service / Technical Support will also close at 1:00 p.m. Eastern Time. All online systems will be available.
- **Jan 11 - 15:** We will be exhibiting at the 61st Annual Heckerling Institute on Estate Planning in Orlando.

Last week's Trusts & Estates news article:
"How Higher Interest Rates Could Change Your Estate Tax Strategy"

Last week's Helpful Hint:
"When to use a CUSIP, ISIN, or SEDOL number"

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.

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 five 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	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.

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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

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