

APPRAISE

By Evaluation Services, Inc.
— Since 1985 —

40th ANNIVERSARY

*QUICK, ACCURATE, AND ECONOMICAL STOCK & BOND VALUATIONS FOR TRUSTS AND ESTATES
FIRST CLASS SERVICE, INNOVATIVE TECHNOLOGY, IRS ACCEPTED*

- ✓ IRS Form 706 Estate Tax Valuations
- ✓ CRUT & GRAT Valuations
- ✓ Issue Research For Options and Ticker Symbols
- ✓ IRS Form 709 Gift Tax Valuations
- ✓ Cost Basis Calculator
- ✓ Corporate Actions, Splits, & Dividends

APPRAISE unleashes the transformative power of disruptive technology with five quick, accurate, and economical ways to integrate estate, gift, and trust tax valuations into your wealth management and estate settlement ecosystems.

1. **APPRAISE API:** a secure interface that streamlines portfolio pricing. This is done by allowing clients to program directly from their trust system into our proprietary pricing system and customize it for their reporting needs. No personal or client data is exchanged. This can be a way to cut costs, improve efficiency, and improve your processing metrics.
2. **APPRAISE Software:** Our proprietary software that has been serving our clients since 1985. Install it on any computer and get the estate, gift, and trust tax valuations you need quickly, accurately, and securely. Portfolios are stored on your computer.
3. **Web Appraise:** A web-based application, accessed through any browser, that provides stock and bond valuations for estate, gift, and trust tax. Portfolios are saved to your account and accessible wherever you are, on any device.
4. **ESI-Direct:** Thomson Reuters ONESOURCE Trust & Estate securities valuations without valuation software. Everything is done from within the Accounting or 706, reducing steps, saving time, and increasing accuracy.
5. **Outsourcing:** Valuations can be submitted/delivered via our online order form.



"Industry News, Helpful Hint, & Upcoming Events" eNewsletter

September 16, 2025

Trusts & Estates News

This week's Trusts and Estates article is:

"Shifting Estates from 'Leave On' to 'Live On'"

(Excerpt from actual article):

"Move beyond a narrow focus on asset distribution to a broader consideration of family values, purpose and long-term impact."



You can read the article by clicking [HERE](#).

Last week's Trust & Estate article was:
"Estate Tax Relief And Long-Term Care"

You can read last week's eNewsletter by clicking [HERE](#).

Helpful Hint

This week's Helpful Hint is:
"Inverse Weighting"

We were recently asked, *"Why does this security: SEDOL # 7108899, valued as of Jan 2, 2025, for estate tax purposes, have prices from Dec 30 & Jan 3?"*



The answer is, per [IRS Regulations](#), we applied Inverse Weighting to calculate the mean price.

Need a trusted partner for your trust, estate, or gift tax valuations?

Let **Evaluation Services Inc. (ESI-APPRAISE)** simplify the process for you. □

Call us at [201-784-8500 x111](tel:201-784-8500) or □ Email us today.

Stay informed—follow us on [LinkedIn](#) for quick insights and news.

Last week's Helpful Hint was:
"Transactions between the date of death and alternate valuation dates."

You can read last week's eNewsletter by clicking [HERE](#).

Weekly Financial Market Review

Our business resides at the intersection of trust & estate law as well as financial data reporting.

We make it easy for our clients to stay current on financial market news by making a weekly market recap available by clicking [HERE](#).



Upcoming Events

(Subject to change - please monitor regularly)

- None.



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Evaluation Services, Inc.

180 OLD TAPPAN ROAD,
BUILDING 4, OLD TAPPAN, NJ
07675
(201) 784-8500
newappraiseesi.com

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