

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

October 8, 2024

Trusts & Estates News

This week's Trust and Estate article is:
"Good Estate Planning Never Goes Out of Style"

(Excerpt from actual article):

Don't let the uncertainty about future tax policy interfere with taking action to meet your client's goals.

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

Last week's Trust & Estate article was:
"The most overlooked aspect of estate planning, and how to address it"

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



Helpful Hint

This week's Helpful Hint is:
"Why CUSIP numbers are better identifiers than ticker symbols for valuations"

A ticker symbol is a combination of letters that identifies a company's stock on a stock exchange. Ticker symbols are used to track and monitor stock prices and performance. Ticker symbols can change over time, such as when a company is reassigned a ticker or is given multiple CUSIPs.

A CUSIP number is a nine-digit alphanumeric code that identifies a security, including the issuer and the type of security. CUSIP numbers are used to distinguish between securities traded in public markets. CUSIPs are more reliable identifiers than tickers because they cannot be reused.

Last week's Helpful Hint was:
"Estate & Gift Tax Valuations in the



Cloud"

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)

- **Thu, Oct 17:** (5:00p EDT) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- **Thu, Oct 24:** (11:30a EDT) October webinar - "*Estate & Gift Tax Valuations in the Cloud.*"
- **Mon, Jan 13 to Fri, Jan 17:** We will be exhibiting at the 59th annual Heckerling Institute on Estate Planning. Plan on stopping by to visit us.



Is there a better way to prepare your valuations?

Why don't you consider us for your stock and bond valuations for trusts & estates? **Maybe there is a better way than how you are doing them now?**

We've been providing these valuations since 1985 and have experience and insight. Our pricing universe contains millions of US and foreign securities with corresponding decades of history. We can speak with you to potentially identify ways to improve accuracy, productivity, and output.



1. Secure online solutions (You do the work to save money.):

- **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.
- **APPRAISE.Web:** 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.
- **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.
 - **APPRAISE.SaaS:** Software as a Service (SaaS) means we host the software, which you access via the internet, and you store your data locally on your computer. This benefits you and your information technology group because a hybrid solution takes the best of software and web and combines them. You're always running the current version and do not need to install updates. Your portfolio data is stored securely on your computers. It's easy to add and remove users. The underlying technology is Citrix.
 - **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.

2. Outsourcing solution (We do the work and save you time.):

Valuations can be submitted/delivered via email, fax, overnight courier, or mail. Click [HERE](#) for an order form.

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