

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

December 3, 2024

Trusts & Estates News

This week's Trust and Estate article is:
**"The Double-Edged Sword Of Sharing
Your Estate Plan With Family"**

(Excerpt from actual article):
In his 2024 letter to Berkshire Hathaway shareholders, Warren Buffett stirred debate among estate planning professionals by recommending that individuals share their estate plans with adult children before signing. While this advice promotes transparency and trust, it also carries the risk of conflict, undue influence, and reduced flexibility. For families with complex estates involving businesses, artwork, or collectibles, this decision demands careful consideration.

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

Last week's Trust & Estate article was:
**"Estate Planning Services Are
Becoming Table Stakes"**

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



Helpful Hint

This week's Helpful Hint is:
"Universal Import"

We released our updated **Universal Import program** which automates the process of entering CUSIP #s/Ticker symbols and shares into Appraise. This saves a tremendous amount of time and eliminates typographical errors. You can watch a [Universal Import preview video](#) by clicking on the link.

If you have questions, you can [EMAIL US](#) for more information.



Last week's Helpful Hint was:
"Pricing Options: Calls, Puts"

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

We explain the six methods we have for obtaining valuations from us in the **"Is there a better way to prepare your valuations?"** section of this eNewsletter. There are technology and outsourcing solutions.

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](#).



Please visit us at the 2025 Heckerling Institute

We will be exhibiting at the 2025 Heckerling Institute on Estate Planning. Please stop by and visit us at booth #501 which is across from the registration desk.

We will be celebrating our 40th anniversary, which begins on January 1, 2025 and have plenty of exciting things to talk about!



Which Estates & Trusts National Conferences Do You Attend?

Heckerling Institute on Estate Planning (Jan)

American Bankers Association Wealth Management (Feb)

NAEPC Advanced Estate Planning Strategies Conference (Oct)

Upcoming Events

(Subject to change - please monitor regularly)

- **Tue, Dec 24:** (1:00p EST) The NASDAQ & NYSE exchanges are closing at 1:00p ET. ESI-APPRAISE Customer Service / Technical Support will be closing at 1:00p ET, as well. All online systems will still be available.
- **Fri, Dec 27:** (3:00p EST) ESI-APPRAISE Customer Service / Technical Support will be closing at 3:00p ET to celebrate our 40th anniversary year which begins on January 1. All online systems will still be available.
- **Tue, Dec 31:** (2:00p EST) ESI-APPRAISE Customer Service / Technical Support will be closing at 2:00p ET for the New Years Day holiday. All online systems will be still be available.



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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