

# APPRAISE

By Evaluation Services, Inc.  
Since 1985

## 40<sup>th</sup> 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

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter  
January 7, 2025

### Trusts & Estates News

This week's Trust and Estate article is:  
**"3 things we learned about estate planning in 2024"**

(Excerpt from actual article):  
*As 2025 is about to begin, many Americans are looking to the future — but they may not be looking far enough ahead. Over the past year, several studies have shown that most Americans are behind on their estate planning. According to the will-writing website FreeWill, only 26% of U.S. adults have done any estate planning at all. There are multiple reasons for this reluctance.*

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

Last week's Trust & Estate article was:  
**"Stock markets to close for Jimmy Carter day of mourning"**

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



## Helpful Hint

This week's Helpful Hint is:

### **"Date of Death Valuations, Stock Splits, Adjusted, & Unadjusted Prices"**

We recently received this query about a date of death valuation.

*"Can you please check the mean price of NVIDIA for 12/28/2021? We are expecting \$30.6709 per share and your date of death valuation had \$306.709."*

We replied, *"The adjusted cost basis for that security, on 12/28/2021, was \$30.6709 per share while the un-adjusted cost basis was \$306.7091 per share due to the 10:1 Reverse Split in June 2024. As such, you may need to reduce the number of shares from 20,000 to 2,000 in order for your total to match the expected total."*

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

Last week's Helpful Hint was:

### **"Impact of Jimmy Carter Nation Day of Mourning on the estate and gift tax valuations."**

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.



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## 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](#).



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**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.



59<sup>TH</sup> ANNUAL HECKERLING INSTITUTE  
ON ESTATE PLANNING™

January 13-17, 2025 · Orlando World Center Marriott

**We are celebrating our 40th anniversary which began on January 1. We have plenty of exciting things to talk about!**

## Upcoming Events

(Subject to change - please monitor regularly)

- **Thu, Jan 9:** Jimmy Carter Day National Day of Mourning. The NASDAQ & NYSE exchanges will be closed and we will be closed as well. All online services will be available.
- **Mon, Jan 20:** Martin Luther King Day holiday. The financial markets will be closed and we will be closed as well. All online services will 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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Perhaps your coworker or colleague would benefit from the information contained in this eNewsletter. Please feel free to share it with them. They can then sign up for their own subscription by clicking on the link below.

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Thank you for subscribing and allowing us to serve you.

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