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By Evaluation Services, Inc.
Makes it Simple!

*Quick, Accurate, and Economical
Historical Stock & Bond Valuations
for Trusts and Estates*

- ✓ IRS Form 706 Estate Tax Valuations
- ✓ IRS Form 709 Gift Tax Valuations
- ✓ CRUT & GRAT Valuations
- ✓ Corporate Actions, Splits, & Dividends
- ✓ Cost Basis for Dividend Reinvestment
- ✓ Form 8971 Reporting
- ✓ Allocate Income Between Form 1040 & 1041 for Calendar & Fiscal Year
- ✓ Fiduciary Accounting
- ✓ Cost Basis Calculator
- ✓ Domestic & International Securities

APPRAISE Secure Online Solutions *(You produce the report and save money)*

- **APPRAISE** SaaS SaaS means Software as a Service; We host the software eliminating upgrades; you save the portfolios on your computer for security
- **APPRAISE** Web Everything is run from the internet using a credit card or account number
- **APPRAISE** Software Software is installed on your computer and portfolios are saved there as well
- **APPRAISE** ESI-Direct No valuation software; value your OTEA securities using the internet

APPRAISE Outsourcing Solutions *(We do the work using your list of assets and save you time)*

- Valuations can be submitted/delivered via email, fax, overnight courier, or mail

Trust & Estate Industry News

This week's feature article is:
"Inflation Reset Lets Wealthy Americans Give Heirs More Tax-Free"

Excerpt (from actual article):
"The US lifetime estate-and-gift tax exemption is up to almost \$26 million for married couples after the highest inflation in decades adjusted the threshold."

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

Last week's feature article was:
"Estate Planning Techniques in a High-Interest-Rate Environment"

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



ESI-Appraise Helpful Hint

This week's topic is:
"Fiduciary Accounting Valuations"
Did you know you can use our valuations for fiduciary accounting reporting? We have access to high/bid, low/ask, close, and mean prices.

If you want more information about our pricing universe, please call us at 201-784-8500 x111 or email us at customerservice@appraisenj.net

Last week's topic was:
"Reducing the time required to process valuations"

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



ESI-APPRAISE Upcoming Events

- None Announced



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