

APPRAISE

By Evaluation Services, Inc.
Makes it Simple!

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

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
January 30, 2024

Trusts & Estates News

**This week's Trust and Estate article is:
"Live from Heckerling: Modern Estate
Administration"**

(Excerpt from actual article):

In a 50-minute presentation based on his 100-plus page outline, Steve R. Akers from Bessemer Trust touched on a myriad of post-death administration challenges.

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

**Last week's Trust & Estate article was:
"IRS flip-flops on gift tax question
involving grantor trusts"**

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



Helpful Hint

**This week's Helpful Hint is:
"IRS Forms 706 & 8971"**

In this week's "Trust & Estates" article (see above), Steve Akers mentions basis reporting requirements for the IRS Form 8971 as well as alternate valuations. We can help you with both of these. We have an IRS Form 8971 reporting tool and our Form 706 alternate valuations have a utility to account for assets which are sold or distributed..

**Last week's Helpful Hint was:
"Introducing Appraise.API"**

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

If you want to speak with us, please:
call: 201-784-8500 x111
email: customerservice@appraisenj.net



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)

- Mon, Feb 19: President's day holiday. Financial markets and ESI-APPRAISE closed.
- Thu, Feb 22: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.



Maybe there is a better way?

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.



Keep reading for a list of valuations we provide and how you can get them.

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Which valuations can I get from ESI-APPRAISE?

We give you access to all the tools, information, and professional support you need to increase your profits and serve your customers better. Additionally, ESI-Appraise offers a broad range of global securities and related financial data from all major markets and exchanges.

- IRS Form 706 Estate Tax Date of Date & Alternate Valuation Date
 - IRS Form 709 Gift Tax
 - IRS Form 8971 Basis reporting & Beneficiaries
 - IRS Form 1040/1041 Income Proration for Calendar or Fiscal Year
 - Distributions
 - Charitable Remainder Unitrusts
 - Grantor Retained Annuity Trusts
 - Capital Changes
 - Cost Basis Calculator for Corporate Actions
 - Cost Basis Calculator for Dividend Reinvestment Plans
-

How can I get a valuation from ESI-APPRAISE?

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

- **APPRAISE.Cloud:** web product which can be run from anywhere
- **APPRAISE.Windows:** software installed and data stored on your computer
- **APPRAISE.SaaS:** our Software as a Service (SaaS) solution. 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 cloud 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.
- **ESI-Direct:** ONESOURCE Trust & Estate securities valuations without valuation software. Everything is done from within the 706, reducing steps, saving time, and increasing accuracy.
- **Universal Import:** A utility which enables users to create portfolios from comma delimited or Excel files in lieu of manually entering CUSIP/Ticker and shares. This works very well with exports from trust systems.

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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Thank you for subscribing and allowing us to serve you.

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