

# 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  
February 13, 2024

## Trusts & Estates News

This week's Trust and Estate article is:  
**"The IRS Is Recruiting an Army to  
Take on Wealthy Taxpayers"**

**(Excerpt from actual article):**  
It's focusing on recruiting those with  
specialized tax expertise.

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

Last week's Trust & Estate article was:  
**"New House GOP Bill Repeals Estate  
Tax"**

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



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## Helpful Hint

This week's Helpful Hint is:  
**"The IRS is investing in compliance.  
Are you ready?"**

This week's Trusts & Estates article states, "While the IRS's recruiting efforts in 2023 were mostly targeted at hiring customer service personnel, it is now focusing on those with specialized tax expertise. *"In the last few months, we've just started hiring external field agents—the revenue agents we need at the higher grades to get to training on these high-income, high-wealth cases."*

If you are not using ESI-APPRAISE for your estate and gift tax valuations, maybe you should be. We are in full compliance with the stringent IRS regulations.

**Last week's Helpful Hint was:  
"APPRAISE Software as a Service"**

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](mailto:customerservice@appraisenj.net)



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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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## 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.
- Fri, Feb 23: The office will open at (10:30a ET). All online services will still be available.



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## 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.

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**Quick, Accurate, and Economical  
Stock & Bond Valuations  
for Trust 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 Plans
- ✓ Form 8971 Reporting
- ✓ Allocate Income Between Form 1040 & 1041 for Calendar & Fiscal Year
- ✓ Fiduciary Accounting
- ✓ Cost Basis Calculator
- ✓ Issue Research

## How can I get a valuation from ESI-APPRAISE?

We provide our clients with a wide array of options to get their valuations from us.

**APPRAISE** secure online solutions (You produce the report and save money)

- **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) Our proprietary APPRAISE application, bundled with additional features and hosted online for your convenience. Accessible from any browser. Portfolios are still saved locally. No installs or updates to worry about.
- **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** Application Programming Interface (API) A secure, programmable interface that provides portfolio pricing by allowing your proprietary systems to communicate with ours directly.
- **ESI-Direct** Price portfolios directly from within the ONESOURCE Accounting or 706 without the need to maintain additional third party valuation software.

**APPRAISE** outsourcing solution (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.

Additional information and sample reports are available at our website [www.appraisenj.com](http://www.appraisenj.com) or you can call 201-784-8500 x111. You can also email [customerservice@appraisenj.net](mailto:customerservice@appraisenj.net)  
Thank you for considering Evaluation Services' **APPRAISE**.

## Evaluation Services, Inc.

*Developers of Appraise*

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