

Date Submitted: _____ **EMAIL COMPLETED FORM TO: customerservice@appraisenj.net**

DELIVER REPORT(S) AND BILL TO:

Name: _____ Company: _____
Address: _____ City: _____ State: _____ Zip: _____
Phone: _____ Fax: _____ Email Address: _____

THIS ORDER IS A(N):

New Order Existing Portfolio Addition Change

(Please Print Your Name Above)

PORTFOLIO INFORMATION: Complete descriptions are required. CUSIP Numbers and Ticker Symbols are appreciated.

Estate/Portfolio Name: _____ and/or Portfolio Number: _____

Report Type: Please select the appropriate box(es) below and provide dates where applicable. Valuation(s) to be performed:
(\$7.25 for each domestic, \$11.90 for each foreign security, \$11.90 for each call and put option in each valuation.)

\$15.00 Minimum Charge

Date of Death: _____ 6 Months After Date of Death: _____
 Date of Gift: _____ Date of Distribution: _____
 Closing Prices _____ Multi-Date Historical Pricing _____
 Split History _____ Dividend History _____ through _____
 1040-1041 Income Calculator: Calendar Year _____ through _____
\$7.25 Research Fee Per Issue or Fiscal Year _____ through _____
 Corp Action/Capital Changes w/ Tax Status — **\$13.00 Research Fee/Issue** Cost Basis Calculator — **\$175.00 Research Fee Per Issue**

FEE SCHEDULE:

Regular Service (4 Business Days) — **Standard Rates (See Above)**
 Next Business Day Service — **All Fees Are Doubled**
 Manually Added Transactions (Mergers, Spin Offs, etc.) — **\$11.90 Additional Charge Per Transaction, Per Report**

DELIVERY OPTIONS: Please check your preference.

Email In Adobe PDF Format — **FREE (Best Option)**
 Email In Optional Format — **\$19.25 Additional Charge**
(Please Check One) One Source BNA Faster
 Estateworks Excel
 Fax — **\$19.25 Additional Charge**
Provide Your Fax Number: _____
 Federal Express Providing Your Account Number — **No Charge**
Your FEDEX Number: _____
 First Class Mail — **\$19.25 Additional Charge**
 Evaluation Services Overnight Courier — **\$38.00**

Provide Your Email Address: _____

I hereby understand I will be billed *Month End* via an *Email Invoice*. And I hereby understand and accept the Fee Schedule stated above.

Prices effective January 1, 2024. Prices subject to change without notice.

Evaluation Services, Inc.

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Visit our website at <http://www.appraisenj.com>

