



**We're Wishing You The Best  
For The Upcoming Year**

# APPRAISE

By Evaluation Services, Inc.  
*Makes it Simple!*

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

## Trust & Estate Industry News

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

Excerpt (from actual article):  
"Rising Section 7520 rates do not spell

doom for good planning, and there is plenty of silver lining to be found even in inflation. As part of our look ahead for 2023, Lathrop GPM's Edward Tully and Jim Thomson offer four key planning concepts that may help make the new year a little brighter for estate planners and their clients.

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



**Last week's feature article was:**  
**"Start A Challenging Estate Planning Conversation"**

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

## 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
- IRS Form 709 Gift Tax
- Charitable Remainder Unitrust
- Grantor Retained Annuity Trust
- Domestic & Global Historical Pricing
- Capital Changes
- Cost Basis Calculator for Corporate Actions
- Cost Basis Calculator for Dividend Reinvestment Plans
- 1040/1041 Income Allocation for Calendar or Fiscal Year

## ESI-Appraise Helpful Hint

**This week's topic is:**  
**"57th Annual Heckerling Institute on Estate Planning"**

We will be exhibiting at the 2023 Heckerling Institute on Estate Planning in Orlando from January 9 to 13. Our booth (#501) is in the same place as past years, right next to the registration area, and across from the walkway to the sessions.

Personally, we appreciate the opportunity to meet our clients, friends, and subscribers. Professionally, the institute provides a forum for us to discuss the valuations we provide and the technology we use to deliver them.

**Please stop by our booth for a short conversation to see if we can help you**



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

January 9-13, 2023 • Orlando World Center Marriott

**with your trust and estate valuations.  
Maybe there is a better way!**

**Last week's topic was:  
"Stock Market Holidays in 2023"**

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

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

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

- **APPRAISE Web:** credit card or account #; can be run from anywhere on any operating system.
- **APPRAISE.Windows:** software 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.
  1. You're always running the current version and do not need to install updates.
  2. It's easy to add and remove users
  3. It has more reports and features than traditional desktop software
  4. You store your data securely on your computers.
- **ESI-Direct:** ONESOURCE Trust & Estate securities valuations without software
- **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.

**2. Outsourcing solution (We do the work and save you time.):** Valuations can be submitted/delivered via email, fax, overnight courier, or mail.

## ESI-APPRAISE Upcoming Events

- Mon, Jan 9 - Fri, Jan 13 we will be exhibiting at the Heckerling Institute on Estate Planning. Come by and visit us.
- Mon, Jan 16: NASDAQ & NYSE closed for Martin Luther King holiday. We are closed as well.



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