

APPRAISE

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:
"Smarter Ways To Make Estate Planning Gifts"

Excerpt (from actual article):

"Last year I reviewed the three best ways to maximize tax-free gifts, an article that continues to draw a lot of online views. In this post I discuss how to decide which assets to give loved ones to minimize not only estate and gift taxes but also income and capital gains taxes."



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:
"Reducing the time required to process valuations "

Some of our customers who prepare the valuations themselves, using one of our online solutions, ask for ways to reduce the processing time. Here are two tips:

1. In lieu of manually entering the assets, the holdings can be imported from a file. There can be multiple, each with its own valuation date, in each import file.
2. Multiple portfolios can be sent for pricing and printed at the same time.

If you want more information regarding either of these time saving ideas, please call us at 201-784-8500 x107 or email us at techsupport@appraisenj.net

Last week's topic was:
"57th Annual Heckerling Institute on Estate Planning"

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



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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