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- ✓ Form 8971 Reporting
- ✓ Allocate Income Between Form 1040 & 1041 for Calendar & Fiscal Year
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- ✓ Cost Basis Calculator
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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:
"The State of the Estate Planning Practice"

Excerpt (from actual article):
"What issues and developments are attorneys encountering as we head into 2023?"

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



Last week's feature article was:
"Inflation Reset Lets Wealthy Americans Give Heirs More Tax-Free"

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

ESI-Appraise Helpful Hint

This week's topic is:
"Helping our clients control their costs"

The final paragraph of this week's feature article includes a sentence which says, "Many firms have had to raise their rates due to inflation and other factors." For 2023, knowing our clients are trying to control their costs in an inflationary environment, we only raised our prices 3%.

Last week's topic was:
"Fiduciary Accounting Valuations"

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



ESI-APPRAISE Upcoming Events

- Feb 18-20: We are upgrading our digital storage over President's Day weekend and all online services will be unavailable.
- Mon, Feb 20: NASDAQ & NYSE closed for the President's Day holiday. We are closed as well.



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