

# APPRAISE

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

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

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- ✓ CRUT & GRAT Valuations
- ✓ Corporate Actions, Splits, & Dividends
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- ✓ 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:  
**"Need an Estate Planning Checkup?  
Now Is the Perfect Time"**

**Excerpt (from actual article):**  
"An appointment with your estate planning attorney can address any holes that have developed and ensure everything is in place."

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

**Last week's feature article was:**  
**"The State of the Estate Planning Practice"**

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



## ESI-Appraise Helpful Hint

This week's topic is:  
**"Phone call from retiring client"**

We recently received a phone call from a client who retired and touched us with her kind words. This is what she said:  
*"I have been very pleased with your service, as you are very prompt and reliable. You are 'top notch', and my company will continue to give you business in the future."*

We offered our best wishes for her retirement. Some of our clients have been with us decades, and maintaining those relationships is one of the most rewarding parts of our job.

**Last week's topic was:**  
**"Helping our clients control their costs"**

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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