

# APPRAISE

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

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

## Industry News

This week's feature article is:  
"How to Help Middle-Rich Clients"

Excerpt (from actual article):  
"Techniques to help minimize estate tax liability for the merely rich, without the cutting-edge strategies often used by the ultra-wealthy."

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

Last week's feature article was:  
"State Experimentation With Wealth Taxes"

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



## Helpful Hint

This week's topic is:  
"Setting up a webappraise account"  
One of the options we offer our clients for estate and gift tax valuations, in addition

to software and software as a service, is a web based solution. It's easy to set up a new account. All you need to do is go to [webappraisenj.com](http://webappraisenj.com) and scroll down to "I do not have an account."

**Last week's topic was:  
"Regulations for preparing Alternate valuation date reporting"**

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



## 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.



**These are the valuations we provide and how you can get them.**

- ✓ 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

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