

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:
"Estate Planning? Four Strategies for
Leaving Assets to Your Heirs"

Excerpt (from actual article):
"No family is exactly like another, so here
are some considerations to help you
decide which distribution strategy best
suits your situation, values and goals."

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

Last week's feature article was:
"How to Help Middle-Rich Clients"

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



Helpful Hint

This week's topic is:
"Investing in our client's experience"
This past three day weekend we
completed a significant technology

upgrade to our data centers. We upgraded the speed of our digital storage, switches, and internet connections. This is part of our commitment to consistently improve our client's experience with us.

**Last week's topic was:
"Setting up a webappraise account"**

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



Upcoming Events

- Fri, Mar 24: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.



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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Thank you for subscribing and allowing us to serve you.

Evaluation Services, Inc.

180 OLD TAPPAN ROAD,
BUILDING 4, OLD TAPPAN, NJ
07675
(201) 784 8500
appraisenj.com

Contact
Us



Evaluation Services, Inc. | 180 OLD TAPPAN ROAD, BUILDING 4, OLD TAPPAN, NJ 07675

[Unsubscribe charles_s_rossmann@appraisenj.net](mailto:unsubscribe_charles_s_rossmann@appraisenj.net)

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