

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:
**"Presley beneficiary battle sets
example of poor estate planning
practices"**

Excerpt (from actual article):

"A badly in debt woman dies leaving the proceeds of substantial insurance policies to her children only to have her trust contested by relatives who claim an amendment naming the children as beneficiaries is invalid with no witnesses, misspelled names, suspicious signatures, and was never given to previous trustees for review as required by agreement. A long, expensive, and protracted legal battle likely is brewing."

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

**Last week's feature article was:
"Estate Planning? Four Strategies for
Leaving Assets to Your Heirs"**

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



Helpful Hint

This week's topic is:

"System Maintenance on Weekends"

As we mentioned in last week's eNewsletter (see below), we are consistently maintaining and upgrading our data centers to serve you better. We schedule this work between 6:00p ET Friday and 6:00p ET on Sunday to minimize the impact on our clients. The system *may be* intermittently unavailable during that time.

Last week's topic was:

"Investing in our client's experience"

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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