

APPRAISE

By Evaluation Services, Inc.
Makes it Simple!

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

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
January 16, 2024

Trusts & Estates News

This week's Trust and Estate article is:
"IRS flip-flops on gift tax question
involving grantor trusts"

(Excerpt from actual article):

The IRS flipped a stance the agency took seven years earlier on the question of whether certain trust distributions amount to a taxable gift.

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

Last week's Trust & Estate article was:
"Spreading the Love: Tax Savings
strategies for Wealth Transfer"

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



Helpful Hint

This week's Helpful Hint is:
"Introducing Appraise.API"

Appraise.API is a secure, programmable interface that provides portfolio pricing by allowing your proprietary systems to communicate with ours directly. This is in addition to our software, software as a service, web, and outsourcing delivery options.

Last week's Helpful Hint was:
"58th Annual Heckerling Institute"

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

If you want to speak with us, please:
call: 201-784-8500 x107
email: techsupport@appraisenj.net



Weekly Financial Market Review

Our business resides at the intersection of trust & estate law as well as financial data reporting.

We make it easy for our clients to stay current on financial market news by making a weekly market recap available by clicking [HERE](#).



Upcoming Events

(Subject to change - please monitor regularly)

- Thu, Jan 18: (3:00p ET) We are upgrading our email server and will not be able to send or receive email until later in the evening. If you need us after 3:00p, please call.
- Thu, Jan 25: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.



Maybe there is a better way?

Why don't you consider us for your stock and bond valuations for trusts & estates?

Maybe there is a better way than how you are doing them now? We've been

providing these valuations since 1985 and have experience and insight.

Keep reading for a list of valuations we provide and how you can get them.

If you want to speak with us, please:
call: 201-784-8500 x111
email: customerservice@appraisenj.net



Which valuations can I get from ESI-APPRAISE?

We give you access to all the tools, information, and professional support you need to increase your profits and serve your customers better. Additionally, ESI-Appraise offers a broad range of global securities and related financial data from all major markets and exchanges.

- IRS Form 706 Estate Tax Date of Date & Alternate Valuation Date
- IRS Form 709 Gift Tax
- IRS Form 8971 Beneficiaries
- IRS Form 1040/1041 Income Proration for Calendar or Fiscal Year
- Distributions
- Charitable Remainder Unitrusts
- Grantor Retained Annuity Trusts
- Capital Changes
- Cost Basis Calculator for Corporate Actions
- Cost Basis Calculator for Dividend Reinvestment Plans

How can I get a valuation from ESI-APPRAISE?

1. Secure online solutions (You do the work to save money.):

- **APPRAISE.Cloud:** web product which can be run from anywhere
- **APPRAISE.Windows:** software installed and data stored on your computer
- **APPRAISE.SaaS:** our Software as a Service (SaaS) solution. SaaS means we host the software, which you access via the internet, and you store your data locally on your computer. This benefits you and your information technology group because a hybrid solution takes the best of software and cloud and combines them. You're always running the current version and do not need to install updates. Your portfolio data is stored securely on your computers. It's easy to add and remove users.
- **ESI-Direct:** ONESOURCE Trust & Estate securities valuations without valuation software. Everything is done from within the 706, reducing steps, saving time, and increasing accuracy.
- **Universal Import:** A utility which enables users to create portfolios from comma delimited or Excel files in lieu of manually entering CUSIP/Ticker and shares. This works very well with exports from trust systems.

2. Outsourcing solution (We do the work and save you time.):

Valuations can be submitted/delivered via email, fax, overnight courier, or mail. Click [HERE](#) for an order form.

Are you the correct recipient of this eNewsletter?

Perhaps your coworker or colleague would benefit from the information contained in

this eNewsletter. Please feel free to share it with them. They can then sign up for their own subscription by clicking on the link below.

[Sign up for ESI-APPRAISE notifications and weekly eNewsletters](#)

You can 'Safely Unsubscribe' by clicking on the link at the bottom of this eNewsletter.

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:charles_s_rossmann@appraisenj.net)

[Constant Contact Data Notice](#)

Sent by editor@appraisenj.net powered by



Try email marketing for free today!