

APPRAISE

By Evaluation Services, Inc.
Makes it Simple!

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

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
July 9, 2024

Trusts & Estates News

This week's Trust and Estate article is:
"How Biden And Trump's Tax And
Estate Planning Proposals Differ"

(Excerpt from actual article):

Both President Joe Biden and former President Donald Trump have proposed significant changes to the tax landscape, particularly concerning wealth transfer tax exemptions (including estate, gift, and generation-skipping transfer tax exemptions), post-mortem basis adjustment rules, and capital gains taxes. Understanding the implications of these proposed plans is crucial for taxpayers and policymakers alike. This article will explain some of the key differences between the Biden and Trump plans, examining how they may shape the future of taxation in the United States.

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

Last week's Trust & Estate article was:
"A Crucial Window for Estate
Planning: Preparing for 2026"



Changes"

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

Helpful Hint

This week's Helpful Hint is:
"We have options identifiers & ticker symbol research"

If you are pricing equities, funds, or options, and do not have the required identifier/symbol, our Research utility may just be what you are looking for. Research services are available on our [website](#) and are integrated into our [webappraise](#) product.



Last week's Helpful Hint was:
"How can I have ESI-APPRAISE prepare the valuation for me If I don't want to do it myself?"

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

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, Jul 18:** (5:00p EDT) System Maintenance - all online services will be unavailable with service being restored within a few hours.



Is there a better way to prepare your valuations?

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. Our pricing universe contains
millions of US and foreign securities with
corresponding decades of history. We
can speak with you to potentially identify ways to improve accuracy, productivity, and
output.



Click [HERE](#) 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

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
US

[Unsubscribe](#) | [Constant Contact Data Notice](#)



Try email marketing for free today!