

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter

October 29, 2024

Trusts & Estates News

This week's Trust and Estate article is:
"Regulation, Wealth Management and the Elections"

(Excerpt from actual article):

"Let's consider the impact of the elections on two specific issues: Regulation of the wealth management industry and tax legislation. "

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

Last week's Trust & Estate article was:
"The Top 5 Issues Facing High-Net-Worth Individuals in 2025"

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



Helpful Hint

This week's Helpful Hint is:
"Did you know we can prepare the valuations for you?"

While many of our clients use one of our self help online solutions, many also have us prepare the valuations for them. All you have to do is complete our [OUTSOURCING ORDER FORM](#) and send it to us with a list of the securities to be valued. We'll send you back a completed report in PDF or XLSX format. It is that simple.

Last week's Helpful Hint was:
"Enter the Check Digit Setting"

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, Nov 7:** (5:00p EDT) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- **Mon, Jan 13 to Fri, Jan 17:** We will be exhibiting at the 59th annual Heckerling Institute on Estate Planning. Plan on stopping by to visit us.



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.



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

- **APPRAISE.API:** a secure interface that streamlines portfolio pricing. This is done by allowing clients to program directly from their trust system into our proprietary pricing system and customize it for their reporting needs. No personal or client data is exchanged. This can be a way to cut costs, improve efficiency, and improve your processing metrics.
- **APPRAISE.Web:** A web-based application, accessed through any browser, that provides stock and bond valuations for estate, gift, and trust tax. Portfolios are saved to your account and accessible wherever you are, on any device.
- **APPRAISE.Software:** Our proprietary software that has been serving our clients since 1985. Install it on any computer and get the estate, gift, and trust tax valuations you need quickly, accurately, and securely.
- **APPRAISE.SaaS:** Software as a Service (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 web 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. The underlying technology is Citrix.
- **ESI-Direct:** Thomson Reuters ONESOURCE Trust & Estate securities valuations without valuation software. Everything is done from within the

Accounting or 706, reducing steps, saving time, and increasing accuracy.

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.

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