

APPRAISE

By Evaluation Services, Inc.
Since 1985

40th ANNIVERSARY

QUICK, ACCURATE, AND ECONOMICAL STOCK & BOND VALUATIONS FOR TRUSTS AND ESTATES
FIRST CLASS SERVICE, INNOVATIVE TECHNOLOGY, IRS ACCEPTED

- ✓ IRS Form 706 Estate Tax Valuations
- ✓ CRUT & GRAT Valuations
- ✓ Issue Research For Options and Ticker Symbols
- ✓ IRS Form 709 Gift Tax Valuations
- ✓ Cost Basis Calculator
- ✓ Corporate Actions, Splits, & Dividends

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
January 28, 2025

Trusts & Estates News

This week's Trust and Estate article is:
"The First 100 Days of the New Congress"

(Excerpt from actual article):
"The 119th Congress was sworn in last Friday, marking the start of what's expected to be a busy year. Republicans control the White House and both chambers of Congress and are mandated to get to work and do so quickly. Now, everyone's eyes are on what lawmakers will try to tackle and what roadblocks stand in the way of making progress on President-Elect Donald Trump's priorities within the first 100 days of this new Congress. Lawmakers have their work cut out for them. Not only will Congress need to begin confirming Trump's cabinet picks, keep the government funded beyond March and potentially address the debt limit, but they'll also need to begin work on one of Trump's main priorities: tax reform and extending the 2017 Tax Cuts and Jobs Act."

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



Last week's Trust & Estate article was:
**"Key Insights From The 59th
Heckerling Institute On Estate
Planning: Navigating The Future In
2025 And Beyond"**

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

Helpful Hint

This week's Helpful Hint is:
**"Jan 29 Webinar: Estate & Gift Tax
Valuations in the Cloud - Now With
Alternate Valuation Date
Transactions!"**

Have you considered the possibility of
preparing estate and gift tax valuations
from a website instead of software? If
you have, and want to learn more,
consider attending our Wednesday,
January 29th webinar, "Estate & Gift Tax
Valuations in the Cloud. It is only 30
minutes and may be a valuable
investment of your time.

Click [HERE](#) to learn more.

If you have questions, you can [EMAIL
US](#) for more information.

Last week's Helpful Hint was:
**"Thank you for visiting us at the 2025
Heckerling Institute on Estate
Planning"**

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

We explain the six methods we have for
obtaining valuations from us in the **"Is
there a better way to prepare your
valuations?"** section of this eNewsletter.
There are technology and outsourcing
solutions.



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)

- **Wed, Jan 29:** (11:30a ET)
January webinar - "[Estate & Gift Tax Valuations in the Cloud.](#)"
- **Thu, Feb 13:** (5:00p EST) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- **Mon, Feb 17:** President's Day holiday. The financial markets will be closed and we will be closed as well. All online services will be available.



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.

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



 Share This Email

 Share This Email

 Share This Email

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!