



September 5, 2017 "Time Saver & Helpful Hint" eNewsletter

APPRAISE

By Evaluation Services, Inc.

Makes it Simple!

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

Customer Feedback

We want to make it easy for our clients to give us feedback. Please click [here](#) if you want to contact us.

Here is a recent testimonial from a client.

"Thanks so much for getting back to me in _____'s absence. I do hope that s(he) is doing well and is taking a vacation day today! Thanks again for your help. I appreciate it very much!"

- Scottsdale, AZ



Feature Articles

This week's feature article is:

THE BELL TOLLS FOR THEE, ESTATE TAX REPEAL

Here is an excerpt from the article:

"Estate tax repeal hasn't been part of the conversation surrounding tax reform lately. I think it's safe to assume that the average Republican hasn't become more supportive of the tax as a concept, but events seem to be changing the calculus and, in this correspondent's mind, signaling that estate tax repeal may be "off the table" in this go-around."

You can access the complete article by clicking [here](#).



Last week's weekly news was:

Why Flexibility Is Key for Estate-Planning Attorneys

and is available by clicking [here](#).

Please read through the entire eNewsletter. Some sections you may find valuable include:

- [Helpful hint & upcoming event\(s\)](#)
- [Complimentary webinar](#)
- [Who is ESI-APPRAISE?](#)

Time Saver / Helpful Hint & Upcoming Events:

Weekly Time Saver / Helpful Hint(s):

Welcome back from the Labor Day weekend holiday. If you need a date of death valuation for someone who passed over the long weekend, you cannot process your valuation till Wednesday since the IRS requires Friday and Tuesday prices for most securities.

Upcoming event(s):

- Sep 8/9: System maintenance 9:00p Fri to 1:00p ET Sat
- Sep 13: Greater New Jersey Estate Planning Council meeting
- Sep 19: City of New York Estate Planning Council meeting
- Sep 27: ESI-APPRAISE Complimentary webinar (see "webinar" section for detail)
- Sep 27: Estate Planning Council of Bergen County meeting



Complimentary Webinar

We instituted a complimentary webinar series to enable our subscribers to receive concise instruction on issues and ideas affecting our industry without having to leave your office.



Our next topic: **"Leveraging National Estate Planning Awareness month"** is scheduled for Wed, Sep 27 from 11:30a to 12:00p ET.

Here is a synopsis:

With school beginning and autumn approaching, it's time to begin planning your participation in the Improving Financial Awareness & Financial Literacy Movement Fall Campaign, as well as the personal finance content media blitz built around the strategic venue of National Estate Planning Awareness month in October.

Click [here](#) to register.

You can access a recording of last month's webinar: **"Appraise in the Cloud"** our web app for trust & estate stock and bond valuations, as well as prior webinars, by clicking on the icon below.



Who is ESI-APPRAISE (Evaluation Services)?

Evaluation Services, the developers of APPRAISE, provides stock and bond valuations which exceed the stringent IRS requirements for Estate, Gift, & Trust tax returns and follow Generally Accepted Accounting Principles. We also perform capital change reporting, cost basis calculations, historical portfolio and exception list pricing.

We offer both outsourcing (full service) and technology driven (self-service) solutions which interface with third party applications.

Outsourcing your valuations to us frees you up to focus exclusively on your most important tasks. Just complete our order form and send us a list of holdings. Then, leave the work to us.

Our self-service solutions include: software, which is an older way to deploy technology, as well as state of the art "software as a service" and web based applications. The newer apps are especially popular because they are easy to implement, always current, scalable, and require minimal support from your technology departments.

You can pay your invoices by check, credit card, or electronic fund transfer. We back all of this up with first class customer service and fair pricing.

Why not give us a try? Click [here](#) for a list of solutions.

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