



July 17, 2018 "Time Saver & Helpful Hint" eNewsletter

Evaluation Services, Inc.
APPRAISE Since 1985

Fast, Accurate, Easy & Economical
 Global Securities Valuations and Cost Basis Calculations.
 ✓ First Class Service ✓ Innovative Technology ✓ IRS Accepted

Weekly News Update

This week's feature article is:

[Family Behind Oxycontin Faces Lawsuit over Opioid Abuse](#)

Here is an excerpt from the article:

"The Sackler family found success developing Oxycontin, but at what cost?"

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

Last week's feature article was:

[Estate Tax Resources](#)

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



Time Saver / Helpful Hint

This week's topic is:

"What is a CINS number?"

CINS was conceived in the 1980s as part of an effort to extend the CUSIP system to international securities. Currently, the CINS system contains entries for approximately 1.3 million different securities. Just as with CUSIP numbers, CINS number consist of nine characters. Each issuer is assigned a unique six-digit number. The next two characters identify the unique security issue. The final character is a check digit to help ensure the first eight digits were received or entered accurately. A unique feature of the CINS system is that the first character is always a letter signifying the domicile country of the issuer.



Last week's Time Saver / Helpful Hint topic was:

"Is there a way to create APPRAISE portfolios without typing everything in?"

You can access the eNewsletter by clicking [HERE](#).

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:

"Introduction to...

APPRAISE v8, including EZPrice & BasisSearch"

is scheduled for Wed, July 25 from 11:30a to 12:00p ET.

Even if you cannot attend the webinar, you will receive a recording.

Here is a synopsis:

APPRAISE Version 8.01, our newest version, was released the first week of June. There are **plenty of exciting new features** we want to introduce you to.

***** All prior versions of APPRAISE will no longer be supported after September 30 *****

Click [HERE](#) to register for the webinar.

Webinar

Web-based seminar
 live online educational pre-
 viewers can submit questions
 see slides while the speaker
 interactive elements - the a

Upcoming Events

Events we are coordinating (all times are ET):

- July 20: System Maintenance beginning at 5:00p
 (all online services will be unavailable till Saturday)
- July 25: Complimentary webinar (11:30a - 12:00p)
 (see webinar section above for more information)

Events we are attending (all times are ET):

- None scheduled till September



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.

Customer Feedback

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



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