



November 6, 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

Trusts & Estates article:

[The Gift Tax Return Trap And How To Avoid It](#)

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

The week ahead:

[Your guide to this week's big events](#)

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

The week in review:

[\(A round-up of some of last week's significant corporate events and news stories.\)](#)

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



If you need immediate, no frills, stock and bond valuations for trusts and estates, or historical portfolio pricing, try [appraise.web](#).

If you're looking to outsource your valuations, or to replace legacy estate valuation software with a state of the art "[software as a service](#)" solution, [EMAIL](#) us.

Thank you for subscribing to our eNewsletter and allowing us to serve you.

Time Saver & Helpful Hint

This week's Time Saver / Helpful Hint is:
 "APPRAISE Version 8.01"

Here are some NEW features everyone will be receiving.

1. Accruals for mutual funds that declare dividends daily and pay later are now available.
2. The choice of entering the par value for foreign bonds in native or US currency.
3. Enhanced report print preview - it now defaults to full screen.
4. Ability to receive notices directly from us through APPRAISE.
5. An "updates are available" button will flash when future versions are available.
6. Improved import/export capabilities including a new Universal Import program



Here are EXCLUSIVE features ONLY our "software as a service" clients will receive.

1. Updates are applied automatically.
2. SaaS installations only require one time information technology certification.
3. Although we host the application, all of the data is stored by you to eliminate risk.
4. SaaS is scalable & portable. It is very easy to add, remove, & relocate users.
5. A new Ticker Symbol grid ensures the Ticker you price represents the CUSIP you need.

If you want more information, please email Don Bolt at accountinfo@appraisenj.net or call him at 201-784-8500 x104.

Last week's Time Saver / Helpful Hint topic was:
 "Pricing foreign securities"

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.

Webinar

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

Our next webinar:

"A better way to price securities within OneSource Trust & Estate Software"
 is scheduled for Tue, Nov 27 from 11:30a to 12:00p ET.

Here is a synopsis:

ESI-Direct, version 1, introduced nearly a decade ago, significantly improved the process by which OneSource Trust and Estate Administration (OTE) clients were able to populate their starting assets for estates and trusts. Since then, the underlying technology has advanced and we collaboratively saw an opportunity to improve the product. The release of version 2 (V2), which has been in development for quite a while, improves the speed and reliability of the valuation process. Our presenter is Earl Linton, Product Trainer for OTE. This is a repeat of the October webinar due to popular demand.

[CLICK HERE TO REGISTER](#)

Prior Webinars:

You can access recordings of our prior webinars by going to our YouTube channel

[ESI-APPRAISE](#)

These 20-30 minute webinars include industry related topics and APPRAISE how to videos.

Upcoming Events

Events we are coordinating (all times are ET):

- Nov 16: System maintenance beginning at 5:00p ET
- Nov 21: 4:00p ET close for the Thanksgiving holiday
- Nov 23: 1:30p ET close in conjunction with the NYSE holiday
- Nov 27: ESI-APPRAISE monthly webinar series (click [HERE](#))



Events we are attending (all times are ET):

- Nov 7: Greater New Jersey Estate Planning Council
"Martin Shenkman - Section 199A, Planning For 2018 And Beyond, and Life Insurance"
- Nov 27: Estate Planning Council of New York City meeting
"Sean R. Weissbar - Tax-Exempt Organizations: An Introductory Overview"
- Nov 29: Estate Planning Council of Bergen County meeting
"Sandra C. Fava - The Intersection of Estate Planning and Divorce"

Subscriber Feedback

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

Here is a recent testimonial from a client.

"Wonderful working with you. And your help and expertise through the process was invaluable. Many thanks." - Saratoga Springs, NY



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