



Fast, Accurate, Easy and Economical
Historical Stock & Bond Valuations for Trusts & Estates
✓ First Class Service ✓ Innovative Technology ✓ IRS Accepted

Weekly News Update

[Making Better Use of Transfer Tax Exemptions](#)

Synopsis: There are still clients who may well have issues of actually incurring gift or estate tax. Transfers to grandchildren may also be an issue, but generation-skipping, the GST tax, is not our focus here. If transfer taxes are an issue, there is also the annual gifting concept – taking advantage of the \$15,000 annual gift tax exclusion for gifts of present interests.



Interested in what the financial markets are doing?
Click [HERE](#) for up to date information.

Time Saver & Helpful Hint

This week's topic is: "Estate and Gift Tax Valuations"

This week's weekly news article says, *"There are still clients who may well have issues of actually incurring gift or estate tax."*

ESI-APPRAISE can help you with either of these tax filings. Our securities valuations are in full compliance with the stringent IRS regulations for estate and gift tax returns.

Click [HERE](#) to see a sample GIFT TAX valuation.

Last week's topic was: "Have us prepare your valuations"

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



Which valuations can I get from ESI-APPRAISE?

We give you access to all the tools, information, and professional support you need to increase your profits and serve your customers better.

- IRS Form 706 Estate Tax
- IRS Form 709 Gift Tax
- Charitable Remainder Unitrust
- Grantor Retained Annuity Trust
- Domestic & Global Historical Pricing
- Capital Changes
- Cost Basis for Dividend Reinvestment Plans & Equities
- 1040 / 1041 Income Allocation to Calendar or Fiscal Year based on date of death

How can I get a valuation from ESI-APPRAISE?

1. Secure online solutions (You do the work, using our tools, and save money)

- APPRAISE Windows: Software on your computer; internet connection to access the data
- APPRAISE ASP, our software as a service (SaaS) solution:
 - Software on our computer, data on your computer for security and peace of mind
 - Always running the current version eliminating the need to install updates
 - Easy to add and remove users
 - More reports and features than traditional, desktop installed, software
- [APPRAISE Web](#): Internet using credit card; can be run from anywhere/any platform
- [ESI-Direct](#): No software; value your ONESOURCE securities using the internet from FPS

2. Outsourcing solution (We have the expertise, do the work, and save you time):

- Valuations can be submitted/delivered via email, fax, overnight courier, or mail

Upcoming ESI-APPRAISE Events

- Aug 27: System Maintenance (5:00p ET)



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