



February 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

Time Saver / Helpful Hint

This week's topic is:

"Understanding the benefits of Software as a Service for Trust, Estate & Gift Tax Valuations"

One of the accelerating trends in technology is the increasing adoption rate of Software as a Service technology. Here is an excerpt from a very recent article explaining the technology.



The SaaS Advantage

The SaaS subscription model ensures that users always have access to the latest possible version of the software without having to pay again for a new version, however.

- You can access the software from multiple devices with a single login
- You gain the ability to store work and access it from just about anywhere without having to manually sync files across multiple devices

All of this illustrates the central advantage of any SaaS model for a business: simplicity and reliability.

How SaaS Can Save Money

The previous business costs of licenses, IT infrastructure and planned downtime for upgrades and patching are traded in for the monthly or yearly subscription fee. When taking all of the possible costs into account, including the ability to rapidly scale up or down without having to make physical on-premise infrastructure changes and manual patching and upgrades, SaaS can actually represent significant savings to a company over the long haul."

SaaS for Trust, Estate, & Gift Tax Valuations

Our SaaS product for trust, estate, and gift valuations, APPRAISE.asp, has also seen a tremendous upswing in utilization as companies recognize the benefits of the technology and want to get started. One additional advantage of APPRAISE.asp is instead of storing data in the "cloud," the data is stored on your company's computer.

If you want more information about APPRAISE.asp, please contact Donald Bolt at: 201.784.8500 x104 or accountinfo@appraisenj.net

If you want to read the entire cited article, please click [here](#).

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

Weekly News Update

This week's feature article is:

How Trusts And Estates Lawyers Can Tremendously Profit By Maximizing Client Relationships

Here is an excerpt from the article:

"Where the majority of the limited lawyers earned less than \$300,000 annually, the majority of the comprehensive lawyers earned over \$1 million annually."

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

Last week's feature article was:

Securities, Basis and Debt... Oh My! You can access the complete article 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:**"1040/1041 Income Allocator"**

is scheduled for Wed, Feb 28 from 11:30a to 12:00p ET.

Webinar

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

Here is a synopsis:

The ESI-APPRAISE 1040-1041 Income Allocator is a powerful tool for the preparation of IRS Form 1040-1041 tax returns when there is a date of death involved. The Allocator calculates and then allocates income, month by month, by calendar or fiscal year, for most security types.

We received this email from a recent user.

"You don't know how much time I have put into trying to allocate the interest and dividends between the individual and the estate. This is very helpful!"

[CLICK HERE TO REGISTER](#)

You can access a recording of last month's webinar: **"Import/Export Shortcuts"**, as well as prior webinars, by clicking on the icon below.

**Upcoming Events****Events we are coordinating (all times are ET):**

- Fri, Feb 9: System maintenance from 5:30p - 11:30p ET
All online systems will be unavailable
- Tue, Feb 28: Complimentary webinar
"1040/1041 Income Allocator"
(see webinar section below for more information and to register)

**Events we are attending (all times are ET):**

- Feb 14: Greater New Jersey Estate Planning Council meeting. The topic is: "A Review of The Best of The 2018 Heckerling Institute on Estate Planning."
- Feb 14: Estate Planning Council of Bergen County meeting. The topic is: "A Review of The Best of The 2018 Heckerling Institute on Estate Planning."
- Mar 21: Estate Planning Council of the City of New York meeting.

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.

Here is a recent testimonial from a client.
"Your service is needed and you do a great job at a fair cost"
- Waco, TX



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