



March 6, 2018 "Time Saver & Helpful Hint" eNewsletter

Evaluation Services, Inc.
Since 1985
APPRAISE

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:

"Continuing education using multiple formats"

As we all know, ongoing continuing education is a necessary discipline to thrive in our professional lives. Towards this end, within the past couple of months we have: attended one estate planning institute, four estate planning council meetings, listened in on two webinars, received daily/weekly updates from information services, and presented two complimentary webinars of our own.



We instituted this weekly "Time Saver & Helpful Hint" eNewsletter to broadcast some of the complimentary material we curate for your continuing education. Additionally, you can access recordings of our webinars. Thank you for subscribing.

Last week's topic was:

"Our pricing vendor"

Check your inbox for last week's eNewsletter if you missed it.

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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:

[Heirs Inherit Uncertainty With New Estate Tax](#)

Here is an excerpt from the article:

"Because the new exemption is on the books for only eight years, estates could face tax bills after 2026 for moves made under the new, temporary limits."

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

Last week's feature article was:

[2017 Tax Act Changes the Focus of Estate Planning to Saving Income Tax](#)

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:
"Dividend Reinvestor"

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

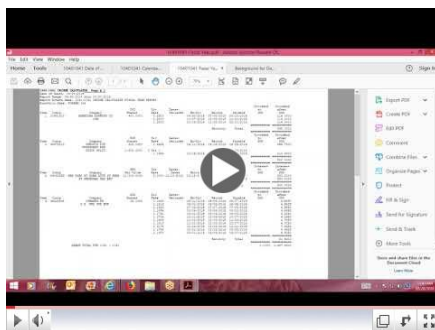
Here is a synopsis:

The Appraise Dividend Reinvestor calculates the cost basis, market value, and capital gains (losses) for dividend reinvestment plans, automatically adjusting for stock splits.

The user provides the purchase and end date, the share amount, and price per security or total transaction value. Additional purchases and sales can also be included. You can start with your current holdings or initial purchase.

[CLICK HERE TO REGISTER](#)

You can access a recording of last month's webinar: "**1040/1041 Income Allocator**", as well as prior webinars, by clicking on the icon below. The handout is available by clicking [here](#).



1040/1041 Income Allocator

Upcoming Events

Events we are coordinating (all times are ET):

- Fri, Mar 16: System Maintenance beginning at 5:30 p.m. ET
- Wed, Mar 28: Complimentary webinar "Dividend Reinvestor" (see webinar section above for more information)

Events we are attending (all times are ET):

- Mar 14: Greater NJ Estate Planning Council meeting. The topic is Financial & Elder Abuse.
- Mar 14: NAEPCC Webinar: High Tax Free Compounded Returns
- Mar 21: Estate Planning Council of the City of New York meeting. The topic is has not been announced yet.



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.

"I know the IRS respects the work done by Evaluation Services."

- Boca Raton, FL



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