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## November 7, 2017 "Time Saver & Helpful Hint" eNewsletter



### Time Saver / Helpful Hint

#### Export to OneSource Trust & Estate Administration

Did you know whether you use our outsourcing service, where you send your estate valuation to us to do for you, or if you use one of our online technology solutions to do the valuations yourself, APPRAISE can create an output file which can then be imported into OneSource Trust & Estate Administration. This process saves time and is more accurate than inputting the values yourself.



#### Table of Contents

Please read through the entire eNewsletter. Some sections you may find valuable include:

- [Weekly News Update](#)
- [Complimentary Webinars](#)
- [Upcoming Events](#)
- [Who is ESI-APPRAISE](#)
- [Feedback from an ESI-APPRAISE client](#)

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

### Weekly News Update

#### This week's feature article is:

[In States, The Estate Tax Nears Extinction](#)

Here is an excerpt from the article:

*"In 2001, all 50 states imposed either an estate or inheritance tax. By next year, the number will be down to 17..."*

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



#### Last week's feature article was:

[How Eliminating The Federal Estate Tax Benefits High-Caliber Trusts And Estates Lawyers](#)

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 webinar topic:

**"Introduction to APPRAISE V8, our newest version, for desktop or cloud computing"** is scheduled for Wed, Nov 29 from 11:30a to 12:00p ET.

#### Here is a synopsis:

APPRAISE v8, our newest version which is available in software or software as a service, is our first release in a couple of years. This webinar will highlight some of the enhancements you can look for.

#### [CLICK HERE TO REGISTER](#)

You can access a recording of last month's webinar: **"The Digital Afterlife"**, as well as prior webinars, by clicking on the icon below.



## Upcoming Events

### Events we are coordinating:

- Nov 25/26: System maintenance  
(all pricing services will be unavailable)
- Nov 29: ESI-APPRAISE complimentary webinar  
(see webinar section for details)



### Events we are attending:

- Nov 8: Greater New Jersey Estate Planning Council meeting
- Nov 28: Estate Planning Council of New York City meeting
- Nov 30: Estate Planning Council of Bergen County 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.

**"I have nothing but praise for the quick, accurate and friendly service provided by Missy Plaine. She is truly stellar!"**

- New York, NY



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