



## April 10, 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:

**"Exporting APPRAISE Valuations in Excel Format"**

Sometimes, even though our [valuations](#) are automatically prepared in IRS ready format, some clients like to export the data to an Excel file for further manipulation. Whether you prefer to do the work yourself using one of our self service technology solutions ([software](#), [software as a service](#), [cloud computing](#)) or you want to [outsource the work to us](#), receiving a completed report in Excel format is an easy process.



Last week's topic was:

**"Escrow Bonds"**

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

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

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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:

[The Price on Her Head: Audits and Appraisals for the Art Aficionado](#)

Here is an excerpt from the article:

*"Christie's will soon auction a brass sculpture of the head of a muse from the estate of a New Orleans art enthusiast for over \$70 million, breaking its own auction record. The fact that the decedent purchased the sculpture for \$5,000 in 1955 signals interesting estate and income tax consequences - possibly impacting multiple generations."*

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



Last week's feature article was:

[Higher estate-tax exemption level could mean less work for advisers](#)

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:

**"How National Financial Literacy Month Can Build Your Practice While Benefiting YOUR Community"**

is scheduled for Wed, Apr 25 from 11:30a to 12:00p ET.

Here is a synopsis:

Find out what your colleagues are doing to participate in National Financial Literacy Month and how it can help your community, clients and prospects while growing your business. Our keynote speaker will be Valentino Sabuco, Executive Director, [The Financial Awareness Foundation](#), a 501(c)(3) Nonprofit dedicated to significantly improving financial awareness & financial literacy.

[CLICK HERE TO REGISTER](#)

Prior Webinars:

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

[ESI-APPRAISE](#) or clicking [HERE](#).



### Upcoming Events

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

- Apr 20 System Maintenance (5:30p - 11:30p)  
All online services will be down.
- Apr 25: Complimentary webinar(11:30a - 12:00p)  
(see webinar section above for more information)



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

- Apr 25: Greater NJ Estate Planning Council meeting  
The topic is "STEP OUT of your comfort zone and take your practice to the next level."

### 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.  
**"You're amazing - a corrected DOD valuation for me and I had it within half an hour"**  
 - Naples, FL



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STAY CONNECTED:

