

Date Submitted: _____ **EMAIL COMPLETED FORM TO: customerservice@appraisenj.net**

DELIVER REPORT(S) AND BILL TO:

Name: _____ Company: _____
Address: _____ City: _____ State: _____ Zip: _____
Phone: _____ Fax: _____ Email Address: _____

THIS ORDER IS A(N):

☐ New Order ☐ Existing Portfolio ☐ Addition ☐ Change

(Please Print Your Name Above)

PORTFOLIO INFORMATION: Complete descriptions are required. CUSIP Numbers and Ticker Symbols are appreciated.

Estate/Portfolio Name: _____ and/or Portfolio Number: _____

Report Type: Please select the appropriate box(es) below and provide dates where applicable. Valuation(s) to be performed:
(\$7.25 for each domestic, \$11.90 for each foreign security, \$11.90 for each call and put option in each valuation.)

\$15.00 Minimum Charge

☐ Date of Death: _____ ☐ 6 Months After Date of Death: _____
☐ Date of Gift: _____ ☐ Date of Distribution: _____
☐ Closing Prices _____ ☐ Multi-Date Historical Pricing _____
☐ Split History _____ ☐ Dividend History _____ through _____
☐ 1040-1041 Income Calculator: ☐ Calendar Year _____ through _____
\$7.25 Research Fee Per Issue or ☐ Fiscal Year _____ through _____
☐ Corp Action/Capital Changes w/ Tax Status — **\$13.00 Research Fee/Issue** ☐ Cost Basis Calculator — **\$175.00 Research Fee Per Issue**

FEE SCHEDULE:

☐ Regular Service (4 Business Days) — **Standard Rates (See Above)**
☐ Next Business Day Service — **All Fees Are Doubled**
☐ Manually Added Transactions (Mergers, Spin Offs, etc.) — **\$11.90 Additional Charge Per Transaction, Per Report**

DELIVERY OPTIONS: Please check your preference.

☐ Email In Adobe PDF Format — **FREE (Best Option)**
☐ Email In Optional Format — **\$19.25 Additional Charge**
(Please Check One) ☐ One Source ☐ BNA ☐ Faster
☐ Estateworks ☐ Excel
Provide Your Email Address: _____
☐ Fax — **\$19.25 Additional Charge**
Provide Your Fax Number: _____
☐ Federal Express Providing Your Account Number — **No Charge**
Your FEDEX Number: _____
☐ First Class Mail — **\$19.25 Additional Charge**
☐ Evaluation Services Overnight Courier — **\$38.00**

☒ I hereby understand I will be billed Month End via an Email Invoice. And I hereby understand and accept the Fee Schedule stated above.

Prices effective January 1, 2024. Prices subject to change without notice.

Evaluation Services, Inc.

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Visit our website at <http://www.appraisenj.com>