

APPRAISE

By Evaluation Services, Inc.

Makes it Simple!

***Quick, Accurate, and Economical
Stock & Bond Valuations
for Trust and Estates***

- ✓ IRS Form 706 Estate Tax Valuations
- ✓ Form 8971 Reporting
- ✓ IRS Form 709 Gift Tax Valuations
- ✓ Allocate Income Between Form 1040 & 1041 for Calendar & Fiscal Year
- ✓ CRUT & GRAT Valuations
- ✓ Fiduciary Accounting
- ✓ Corporate Actions, Splits, & Dividends
- ✓ Cost Basis Calculator
- ✓ Cost Basis for Dividend Reinvestment Plans
- ✓ Issue Research

APPRAISE secure online solutions (You produce the report and save money)

- **APPRAISE** Software Our proprietary software that has been serving our clients since 1985. Install it on any computer and get the estate, gift, and trust tax valuations you need quickly, accurately, and securely
- **APPRAISE** SaaS
(Software-as-a-Service) Our proprietary APPRAISE application, bundled with additional features and hosted online for your convenience. Accessible from any browser. Portfolios are still saved locally. No installs or updates to worry about.
- **APPRAISE** Web A web-based application, accessed through any browser, that provides stock and bond valuations for estate, gift, and trust tax. Portfolios are saved to your account and accessible wherever you are, on any device
- **APPRAISE** Application
Programming Interface (API) A secure, programmable interface that provides portfolio pricing by allowing your proprietary systems to communicate with ours directly.
- **ESI-Direct** Price portfolios directly from within the ONESOURCE Accounting or 706 without the need to maintain additional third party valuation software.

APPRAISE outsourcing solution (We do the work, using your list of assets, and save you time).

- Valuations can be submitted/delivered via email, fax, overnight courier, or mail.

Additional information and sample reports are available at our website www.appraisenj.com or you can call 201-784-8500 x111. You can also email customerservice@appraisenj.net
Thank you for considering Evaluation Services' **APPRAISE**.

Evaluation Services, Inc.

Developers of Appraise

180 Old Tappan Road, Bldg. #4, Old Tappan, New Jersey 07675

Telephone: 201-784-8500 Fax: 201-784-9685

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