

February 1, 2012 "Time Saver & Helpful Hint" ENewsletter

► **Feature Article:** [Closing Down the Estate](#)



► **Interactive Webcasts:** All webcast are 11:30a-12:00p E.T.
Please register in advance by sending your contact information to:
accountinfo@appraisenj.net. There is no charge for them

Tuesday, Feb 14: **Determining Capital Gain/Loss for Dividend Reinvestment Plans**

Tuesday, Feb 28: **Determining Cost Basis Using the Cost Basis Calculator**

► **Our Global Valuations!** [Estate and Gift Tax](#), [1040-1041 Income Allocator](#), [Capital Change Reporting and Cost Basis Calculations](#), [Dividend Reinvestor](#), [High / Low / Closing Prices](#), [Multi Date Pricing Report](#), [Splits / Dividends/ Issue Research](#), [Unitrust Valuations](#)

► **How can I submit valuations to ESI?** [Outsource](#), [Software](#), [ASP](#), [APPRAISE.Web](#), [ESIDirect](#)



► The Heckerling 2012 Reports are now available on the ABA website. The technology editor wrote the following comments about our new APPRAISE.web online solution:

Appraise is produced by Evaluation Service Inc., and is a web based e-commerce model program, in full compliance with IRS Regulations to value securities from anywhere Internet access is available. All you need to do is provide an email and create a password to use the system. Once in you can input data and value assets using either ticker or CUSIP numbers. They provide reports for Date of Death, Alternate Valuation Date, Gift Tax, Market Value, and closing prices.

There is no software to install and no necessity to call your IT department. Reports can be emailed to yourself, clients and others. Payment can be made via credit (so you can get those rewards) and your asset information will be stored on their servers for 10 months if you want to go back to a valuation.



► We like to "WOW!" our customers by providing them with excellent products, excellent customer service, and keeping them abreast of issues affecting our industry. Here is some recent correspondence:

"You handled my request promptly & efficiently" - Santa Ana, CA



► **Need to speak with us?**
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Thank you for your business. It's our pleasure to serve you.