



About EVP Office

The best software for historical securities pricing, bar none

EVP Office is a suite of Windows applications that make producing securities evaluations for IRS Form 706 fast and easy. The **unquestioned industry leader** for over thirty years, EVP Office's flagship program—**EstateVal**—is the most accurate, easiest-to-use, and fastest application to get you (and your clients) what you need.

EstateVal

The most popular software for historical securities pricing there is, and for good reason—EstateVal sets the standard. There are thousands of people who rely on EstateVal's accuracy and ease-of-use every day.

GiftVal

Everything EstateVal does for estates, GiftVal does for gifts—just as accurately, and just as fast. GiftVal makes filing Form 709 a breeze.

CostBasis

Establishing the cost-basis of a portfolio can be a lot of work—unless you have software to handle gathering the historical prices for you. CostBasis makes a tedious job easy.

CapWatch

Get instant access to millions of capital changes, for both equities and fixed-income securities—splits, spin-offs, mergers, exchanges, bankruptcies, and more. Get the history of every change to an almost limitless list.

The screenshot shows the EstateVal application window titled "Doe, John - 8573 - EstateVal". The menu bar includes File, Edit, View, Research, Evaluate, Report, Billing, Tools, and Help. The toolbar contains various icons for file operations and a "No Unread Messages" notification. The main interface is divided into two sections. On the left, there are input fields for "Date of Death" (11/19/2018), "Alternate Date" (05/19/2019), "Name" (John Doe), "Account" (Doe #8573), and "Title" (Estate Valuation). An "Edit Dates" button is located next to the alternate date field. On the right, there is a table with the following data:

	Identifier	Shares / Par	
1	459200101	500	● ○
2	36205KFZ0	100000	✗ ○
3	037833100	350	● ○
4	460923105	10000	● ○
5	969904101	300	● ○
6	544582DU0	50000	● ○
7	912540KU4	1000	● ○
8			
9			