



Ease of Use

The whole point is to make your life easier

EstateVal is fast, intuitive, and crash-free. It's professional software that's been specifically designed to make your job easier. From nice conveniences to rock-solid core functionality, **EstateVal is the best application** for your historical securities pricing for estate taxes.

Windows Standards

EstateVal has the look-and-feel of a standard Windows program, so it works like all your other software, from menus and accelerator keys to copy-and-paste.

Excel-Like Data Entry

If you've used Excel, then you know how to use EstateVal—just enter your data into the grid using all the same keystrokes. Insert, delete, move up, move down, all just a key press away.

Cut-and-Paste from Excel

If you have securities and their shares in Excel or in a comma-separated text file, getting them into EstateVal is as simple as a copy-and-paste. Nothing is faster.

On-the-Fly Data Entry Warnings

Portfolios can be complex, and EstateVal is smart enough to warn you when data doesn't make sense, even before you run an evaluation. Accidentally entered the remaining-principal for a mortgage-backed security instead of the face-value? Set a sale after the Alternate Date? Made a typo on a CUSIP? EstateVal will give you a heads-up.

	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			

	A	B	C	D	E	F
1	45920010	500				
2	36205KFZ	100000				
3	03783310	350				
4	46092310	10000				
5	96990410	300				