



# About EVP Office

The best software for historical securities pricing, bar none

**EVP Office is a suite of Windows applications** that make valuing securities for IRS Form 706 and 709 fast, easy, and accurate. The **undisputed industry leader** for almost 40 years, EVP Office’s flagship program—**EstateVal**—is best way to get what you (and your clients) 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.

The screenshot shows the EstateVal software interface for a client named John Doe. The window title is "John Doe Estate - 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 notification for "One Unread Message".

On the left side, there are input fields for:
 

- Date of Death: 04/05/2023
- Alternate Date: 10/05/2023
- Name: J. Doe
- Account: Trust #873-450
- Title: Estate Valuation
- Assets Held in Joint Account
- Notes

On the right side, there is a table with the following columns: Identifier, Shares / Par, Name, and a status indicator (green dots). The table contains the following data:

	Identifier	Shares / Par	Name	
1	46625H100	10000	JPMORGAN CHASE & CO	●●
2	6298542	2000	EAST JAPAN RAILWAY	●●
3	IBM	512	INTERNATIONAL BUSINESS	●●
4	#BTC	3.2583	Bitcoin	●●
5	!AUAM	285	Gold, 10:30am London	●●
6	\$EUR	30000	Euro	●●
7	CASH	95623.34	Cash	●●
8				
9				
10				
11				
12				
13				
14				
15				

At the bottom right of the table, it says "Security Count: 7" and "Adjust Inventories".