

EVP OFFICE (featuring EstateVal and GiftVal) is the easiest, fastest, most detailed, and most accurate way to evaluate millions of securities, foreign and domestic, for IRS Forms 706 and 709.



Copy-and-Paste from Excel: Loading your holdings from Excel into EVP Office is as simple as copy-and-paste.

More Than Securities: EVP Office supports pricing of foreign currencies, over two dozen cryptocurrencies, put/call options, broker-quoted securities, and precious metals.

Name Previews: Enter a CUSIP, SEDOL, or ticker and see the security's name instantly, free of charge.

Data Input Warnings: Make a mistake entering data into EVP Office and it will flag the problem and offer how to correct it.

Section 508 Compliance: EVP Office adheres the US government's accessibility standards.



Easy Portfolio Status: Icons next to each entry in a portfolio make it easy to see the status of each holding—priced, manually edited, or unpriced.

Simple File Management: Portfolio files are easy to keep track of when there's only one per client, holding all the data for every evaluation.

Lowest Price, Highest Discounts: EVP Office costs less than other solutions, and has no sign-up, support, upgrade, per-user or minimum fees. You only pay for evaluations. There are also volume discounts of up to 35%.

The screenshot shows the EstateVal software interface for a client named John Doe. The interface includes a menu bar (File, Edit, View, Research, Evaluate, Report, Billing, Tools, Help) and a toolbar with various icons. The main area is divided into two sections: a form for client information and a table for the portfolio.

Client Information Form:

- Date of Death: 04/05/2018
- Alternate Date: 10/05/2018
- Name: J. Doe
- Account: Trust #873-450
- Title: Estate Valuation
- Assets Held in Joint Account: (empty)
- Notes: (empty)

Portfolio Table:

	Identifier	Shares
1	46625H100	10000
2	6298542	2000
3	IBM	512
4	#BTC	3.2583
5	!AUAM	285
6	\$EUR	30000
7	CASH	95623.3
8		
9		
10		
11		
12		
13		
14		