

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter

March 28, 2023

Industry News

This week's feature article is:
"Wealthy Clients Could Get Hammered By Estate Tax In 2026"

Excerpt (from actual article):
"The possible expiration of some provisions of the Tax Cuts and Jobs Act in three years is beginning to turn up the heat on estate tax planning.

You can read the article by clicking [HERE](#).

Last week's feature article was:
"Six Reasons Tax Season Should Also Be Estate Planning Season"

You can read last week's eNewsletter by clicking [HERE](#).



Helpful Hint

This week's topic is:
"Existing fax/email client wants to know more about Appraise-Web service"

We recently received this question from an existing client:

"Hi there! I've always utilized your fax/email service for years, but I'm curious about trying out your Appraise-Web service. Would I create a new account to access it? "

Here is our answer:

"To Utilize our Appraise.Web service, you would need to register on the site with an email address and a password of your choosing. The price would be \$4.30 per security for non-subscribers and \$2.65 for subscribers."

You can learn more about Appraise-web by clicking [HERE](#).



Last week's topic was:
"Using SEDOL numbers to price
international securities"

You can read last week's eNewsletter by
clicking [HERE](#).

Maybe there is a better way?

Why don't you ask us about your stock
and bond valuations for trusts & estates?
Maybe there is a better way than how
you are doing them now?

There is a list of the valuations we
provide, and how you can get them,
further along in this eNewsletter.

Either call us at 201-784-8500 x111 or
[EMAIL US](#).

There is no risk in asking, only
possibilities.



Upcoming Events

- Fri, Apr 28: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.



These are the valuations we provide and how you can get them.

- ✓ IRS Form 706 Estate Tax Valuations
- ✓ IRS Form 709 Gift Tax Valuations
- ✓ CRUT & GRAT Valuations
- ✓ Corporate Actions, Splits, & Dividends
- ✓ Cost Basis for Dividend Reinvestment
- ✓ Form 8971 Reporting
- ✓ Allocate Income Between Form 1040 & 1041 for Calendar & Fiscal Year
- ✓ Fiduciary Accounting
- ✓ Cost Basis Calculator
- ✓ Domestic & International Securities

APPRAISE Secure Online Solutions *(You produce the report and save money)*

- **APPRAISE** SaaS SaaS means Software as a Service; We host the software eliminating upgrades; you save the portfolios on your computer for security
- **APPRAISE** Web Everything is run from the internet using a credit card or account number
- **APPRAISE** Software Software is installed on your computer and portfolios are saved there as well
- **APPRAISE** ESI-Direct No valuation software; value your OTEA securities using the internet

APPRAISE Outsourcing Solutions *(We do the work using your list of assets and save you time)*

- Valuations can be submitted/delivered via email, fax, overnight courier, or mail

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