

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

April 4, 2023

### Industry News

This week's feature article is:  
**"Democratic senators take aim at estate tax strategies for ultra-wealthy"**

**Excerpt (from actual article):**  
"Sen. Elizabeth Warren, D-Mass., and three colleagues urge Treasury Secretary Janet Yellen to curb the use of grantor retained annuity trusts in the name of tax fairness."



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

Last week's feature article was:  
**"Wealthy Clients Could Get Hammered By Estate Tax In 2026"**

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

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### Helpful Hint

This week's topic is:  
**"NASDAQ & NYSE stock exchanges are closed on Good Friday but the bond markets are open."**

This is a complicated holiday for estate and gift tax valuation purposes because the stock exchanges are closed but the bond markets are open. The safest way to ensure you get a correct valuation, if someone passes over the three day weekend, is to wait till Tuesday so the Monday prices can be updated from the stock exchanges.

Last week's topic was:  
**"UExisting fax/email client wants to know more about Appraise-Web service"**



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

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# Celebrating April as Financial Literacy Month

This first of four briefs on "Financial Literacy Month" was written by the [The Financial Awareness Foundation](#).

April is Financial Literacy Month and a great time to make sure that your financial, estate and gift plans are up-to-date.

Teaching financial awareness, financial literacy and the essential principles to smart money management are so very important as this gives people the tools of empowerment to make better informed everyday money decisions so you can

- Make wiser informed everyday money decisions
- Live a quality life without outliving their wealth
- Watch personal / family dreams become a reality
- Enjoy a financially secure debt free future
- Work efficiently with financial professionals & product providers to get the best results from their time and money
- Pass on their values, knowledge & assets to future generations to make their lives & this world a better place, ending inherited poverty
- Have the highest probability to reach & maintain family dreams while living out a financially successful life

[Click here to Learn How Improving Financial Awareness & Financial Literacy Can Increase Your Bottom Line](#)



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## 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?

Keep reading for a list of valuations we provide, and how you can obtain them

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

**There is no risk in asking, only possibilities.**

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# Upcoming Events

- Fri, Apr 7: NASDAQ & NYSE closed for the Good Friday holiday. We are closed as well.
- Fri, Apr 28: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.



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

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