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Fast, Accurate, Easy and Economical
Historical Stock & Bond Valuations for Trusts & Estates
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"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
April 11, 2023

Industry News

This week's feature article is:
"The Mystery Behind a $7B Estate Tax Payment"

Excerpt (from actual article):
"On Feb. 28, 2023, the U.S. Treasury received a payment of $7 billion in the category of “estate and gift” taxes. It was the highest collection of that kind of tax since at least 2005."

You can read the article by clicking **HERE**.

Last week's feature article was:
"Democratic senators take aim at estate tax strategies for ultra-wealthy"

You can read last week's eNewsletter by clicking **HERE**.

Helpful Hint

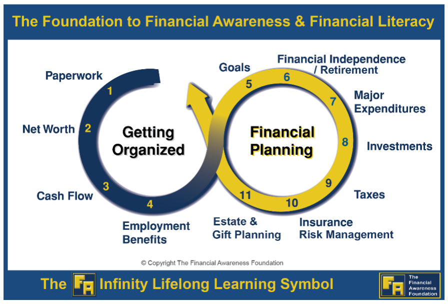
This week's topic is:
"Mandatory CUSIP Number Exchanges"

One of our clients was valuing a security which had a mandatory CUSIP number exchange from (11271J107) to (113004105) on December 1, 2022. The valuation date was August 3, 2022. They wanted to know which CUSIP number to use. We informed them that since the valuation date was before the exchange date, they needed to use the original.

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

You can read last week's eNewsletter by clicking **HERE**.

Celebrating April as Financial Literacy Month



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

Celebrating April as Financial Literacy Month is a great time to make sure that you, and your clients financial house is in order with a current financial, estate and gift plan.

Staying organized and planning wisely are keys to financial success, especially in these challenging uncertain times. As you know, short of winning the lottery or inheriting millions, few people attain and maintain financial success and security without forethought, a strategy, and ongoing management. Learn this powerful simple process to make better everyday money decisions so you have the best chance of watching your personal and family dreams become a reality.

As you can see from **The FA Infinity Lifelong Learning Symbol,** the various personal finance elements that requires attention to keep your financial house in order. You can use this as a checklist to explain the various elements to your clients and how they apply to them.

The crafting of a good comprehensive financial plan starts with some organization, followed by defining what's important to you - your personal and financial goals, followed by some planning, implementation, tracking and monitoring.

Rich, poor or somewhere in between--that's about half the adults in your hometown: many prospects that need your assistance and are able to pay for your expertise.

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.

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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