

Fast, Accurate, Easy and Economical
Historical Stock & Bond Valuations for Trusts & Estates

✓ First Class Service ✓ Innovative Technology ✓ IRS Accepted

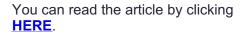
"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
April 25, 2023

## **Industry News**

This week's feature article is:
"How Estates Can Reduce a Double
Death Tax on Decedents' Income"

#### Excerpt (from actual article):

"If one thing is anathema to taxpayers and their advisers, it's paying tax twice on the same income. Sometimes, they'll twist themselves and the Tax Code into a pretzel to avoid it. Other times, the relief they seek is hiding in plain sight. Such is the case with the deduction for federal estate tax on income in respect of a decedent, which simply is income that is earned before death but paid after death. It's taxed to whoever receives it. In some cases, an estate will be the recipient; in others, it may be a designated beneficiary."



Last week's feature article was:
"More Americans are dealing with tax
filings for trusts as older boomers
pass away"

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



# **Helpful Hint**

This week's topic is:

"Simplifying IRS Form 1040 and 1041 preparation."

Last week's feature news article said, "More Americans are dealing with estate and trust taxes as their baby boomer parents and older loved ones pass away. The number of income tax returns for estates and trusts (Form 1041) increased by 14.9% to 3.24 million in 2021 from 2.82 million in 2020, according to Accounting Today."

We are considering enhancing our existing IRS Form 1040/1041 reporting tool which carves out interest and dividends accrued before and after death

Is this a product you would be interested in?

Please take our two question survey.

Last week's topic was: "ESI-APPRAISE 1040/1041 Income Allocator"

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!

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

✓ 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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