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Historical Stock & Bond Valuations for Trusts & Estates

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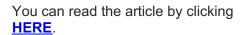
"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
May 16, 2023

#### **Trust & Estate News**

This week's feature article is:
"Estate Planning Strategies For Gen Z
Beneficiaries"

#### Excerpt (from actual article):

Estate plans are frequently designed to create a legacy that extends beyond a single generation. For this reason, if you are creating an estate plan, you may wish to consider the characteristics of the younger generations—particularly Gen Z—to ensure your estate planning goals are met.



Last week's feature article was:
"IRS: Gifts to Irrevocable Grantor
Trust Will Not Receive Basis Step-Up
At Death"

You can read last week's eNewsletter by clicking <u>HERE</u>.



# **Helpful Hint**

This week's topic is:

"Embracing Gen-Z's Zealous Use of Technology"

One of the points of this week's feature Trust & Estate news article is that Gen-Z is zealous about their use of technology. We have found that this generation is embracing our **webappraise platform** because they can generate valuations from anywhere on any device.

Last week's topic was:

"Which dividends are included in date of death valuations?"

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



#### **Financial Market News**

This week's topic is:
"The Weekly Fix: Debt Ceiling Roulette
Adds to Recession Angst"

# The Weekly Fix

from **Bloomberg**Markets

Excerpt (from actual article):
As the US debt ceiling deadline
gets closer and closer, signs of alarm are
starting to spread across markets.

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

## **Upcoming Events**

- Fri, May 19: (5:00p ET) System
   Maintenance all online services
   will be unavailable with service
   being restored within a few hours.
- Fri, May 26: (2:30p ET) Support will be closing early for the Memorial Day Holiday.



## 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 get them.

Either call us at 201-784-8500 x111 or **EMAIL US**.

There is no risk in asking, only possibilities.



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

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