

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

May 23, 2023

Trust & Estate News

This week's feature article is:
"8 estate planning tips for advisors with artists and entertainer clients"

Excerpt (from actual article):

Whether they are an award-winning musician, a successful visual artist, a television producer or a bestselling author, wealthy individuals in the creative professions can be exciting clients for financial advisors.

They can also present unique challenges to one's practice, especially when it comes to preserving the wealth they have built — often self-made, first-generation wealth — and passing it down harmoniously to their descendants and loved ones.

You can read the article by clicking [HERE](#). *You will need to create a guest account with Financial Planning to read the article.*

Last week's feature article was:
"Estate Planning Strategies For Gen Z Beneficiaries"

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



Helpful Hint

This week's topic is:
"Which browser(s) work best with webappraise for estate and gift tax valuations?"

Last week, our topic was how Gen-Z is embracing our **webappraise** platform for estate and gift tax valuations.

Since then, we received questions about which browser(s) work best with the product. We suggest Edge first and Chrome second.

Last week's topic was:

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

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



Financial Market News

This week's topic is:
"A Debt Ceiling Deal? The Problems Don't End There."

The Weekly Fix

from **Bloomberg**Markets

Excerpt (from actual article):

Finally, there seems to be a deal in sight to raise the US debt ceiling and avoid a potential unprecedented default. House Speaker Kevin McCarthy said Thursday that negotiators may reach an agreement in principle as soon as this weekend, lining up a vote in his chamber next week.

A deal isn't guaranteed at this point, of course. But financial markets, figuratively, breathed a sigh of relief. So is the coast clear? Not necessarily.

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

Upcoming Events

- Fri, May 26: (3:00p 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
- ✓ 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

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