

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

June 20, 2023

Trust & Estate News

This week's feature article is:
**"An Estate & Trust Professional's
Four Takeaways From Tax Season
2023"**

(Excerpt from actual article):

Another tax season has come and gone. As we shift our focus to extended and fiscal year returns, other duties, and possibly a well-earned vacation, here are four things I noticed as an estate and trust professional during the most recent tax season.



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

Last week's feature article was:
**"Biden Administration's Green Book
Proposes Dramatic Estate Planning
Changes"**

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

Helpful Hint

This week's topic is:
"Gift Tax Valuations"

The feature article of this week's eNewsletter includes gift tax returns. We provide stock and bond gift tax valuations in full compliance with the [stringent IRS Form 709 reporting requirements](#).

Click [HERE](#) to see a complete sample valuation.

If you would like more information, please [EMAIL US](#).

Last week's topic was:
**"Did you know you can include assets
other than stocks and bonds in an
APPRAISE valuation?"**

You can read last week's eNewsletter by



clicking [HERE](#).

Financial Market News

This week's topic is:
"The Weekly Fix: So Why Didn't the Fed Just Go-Ahead and Hike?"

The Weekly Fix

from **Bloomberg**Markets

Excerpt (from actual article):

Two weeks ago, this newsletter wondered what's stopping the Federal Reserve from just going ahead with a rate hike this month. Fresh off the first no-move meeting since the Fed's liftoff last March, that's still the question being asked.

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

Upcoming Events

- Fri, Jun 23: System Maintenance beginning at 5:00p ET. All online services will be unavailable and will be restored within a few hours.
- Mon, Jul 3: NASDAQ & NYSE markets closing at 1:00p for the Fourth of July holiday. We will be closing at 1:00p ET as well.
- Tue, Jul 4: NASDAQ & NYSE markets closed for the Fourth of July holiday. We will be closed as well



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.

If you want more information, either call us at 201-784-8500 x103 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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- **APPRAISE** ESI-Direct No valuation software; value your OTEA securities using the internet

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- Valuations can be submitted/delivered via email, fax, overnight courier, or mail

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BUILDING 4, OLD TAPPAN, NJ
07675

(201) 784 8500
appraisenj.com

**Contact
Us**



[Unsubscribe charles_s_rossmann@appraisenj.net](#)

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