

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

/ First Class Service / Innovative Technology / IRS Accepted

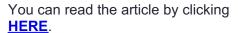
"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
July 11, 2023

Trust & Estate News

This week's feature article is: "AICPA Recommends Changes to IRS Form 706-GS (D-1)"

(Excerpt from actual article):

The American Institute of CPAs (AICPA), provided the Department of the Treasury and the Internal Revenue Service (IRS) issues and recommendations for improvements to the Form 706-GS(D-1), Notification of Distribution from a Generation-Skipping Trust, and instructions and extensions, as well as guidance and regulations updates if Treasury and the IRS find that there are issues beyond changes to the form and instructions.



Last week's feature article was: "Heirs Can Be Personally Liable For Estate's Taxes"

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



Helpful Hint

This week's topic is: "Bond Pricing"

The topic of our financial news article this week (see next section of this eNewsletter) is "Bonds crash as recession bets get vaporized."

The article includes quite a few references to bond pricing. While equity pricing is relatively easy to find, bond valuations are much more difficult. All of our delivery methods: outsourcing, software, software as a service, and webappraise, include bond pricing.

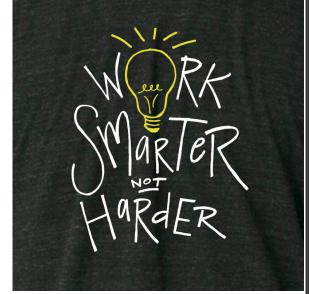
If you are not already a client,

webappraisenj.com, is a quick and easy way to get started with us.

If you want more information, either call us at 201-784-8500 x103 or EMAIL us.

Last week's topic was: "New IRS Form 8971 product for Appraise clients"

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



Financial Market News

This week's topic is:

"Bonds crash as recession bets get vaporized"

Excerpt (from actual article):

It really was deja vu all over again. The global bond rout accelerated into the end of the week as investors once more bailed on bets that an imminent recession would force central banks to halt interestrate hikes and pivot toward cuts. Similar dynamics have played out at least three times during the last 18 months or so.

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

The Weekly Fix

from **BloombergMarkets**

Upcoming Events

- Fri, Jul 21: (5:00p ET) System
 Maintenance all online services
 will be unavailable with service
 being restored within a few hours.
- Fri, Aug 4: (5:00p ET) System
 Maintenance all online services
 will be unavailable with service
 being restored within a few hours.
- Fri, Aug 11: (5:00p ET) System
 Maintenance all online services
 will be unavailable with service
 being restored within a few hours.
- Fri, Aug 18: (5:00p ET) System Maintenance - all online services will be unavailable with service



being restored within a few hours.

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

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

Are you the correct recipient of this eNewsletter?

Perhaps your coworker or colleague would benefit from the information contained in this eNewsletter. Please feel free to share it with them. They can then sign up for their

own subscription by clicking on the link below.

Sign up for ESI-APPRAISE notifications and weekly eNewsletters

You can 'Safely Unsubscribe' by clicking on the link at the bottom of this eNewsletter.

Thank you for subscribing and allowing us to serve you.

Evaluation Services, Inc.

180 OLD TAPPAN ROAD, BUILDING 4, OLD TAPPAN, NJ 07675 (201) 784 8500 appraisenj.com Contact Us





Evaluation Services, Inc. | 180 OLD TAPPAN ROAD, BUILDING 4, OLD TAPPAN, NJ 07675

Unsubscribe charles s rossmann@appraisenj.net

Constant Contact Data Notice

Sent byeditor@appraisenj.netpowered by



Try email marketing for free today!