

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 18, 2023

Trust & Estate News

This week's feature article is: "How to Handle Estate Planning for **Multigenerational Living Arrangements**"

(Excerpt from actual article):

When multiple generations live on the same property, issues over ownership, who inherits what and who provides what can get complicated fast.

You can read the article by clicking HERE.

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

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



Helpful Hint

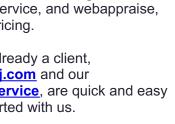
This week's topic is: "Bond Pricing...Again"

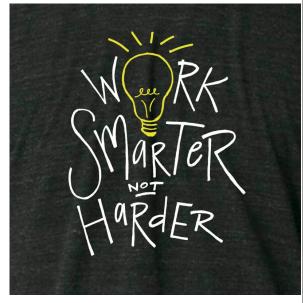
The article cited in this week's Financial Market News (see below) says: "And say you are worried about the economy, or about the health of Corporate America heading into earnings season — perhaps the corporate bond market is the place for vou."

As we mentioned last week, while equity pricing is easy to find, bond pricing including yield, is much harder. 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 and our outsourcing service, are quick and easy ways 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: "Bond Pricing"

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

Financial Market News

This week's topic is:

"The Weekly Fix: The Fed Has Forced Its Own Hand Once Again"

Excerpt (from actual article):

A little over a month ago, this newsletter asked why the Federal Reserve shouldn't just forgo the well-telegraphed 'skip' and just hike in June. Now it's time to ask the inverse question: with headline inflation back to 3% and signs that the so-called supercore segment is cooling, why not hold rates steady at July's meeting? Both questions have the same answer: policy makers said they would, and now they have to deliver.

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

The Weekly Fix

from **BloombergMarkets**

Upcoming Events

- Fri, Jul 28: (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

√ 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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