

"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 you."*

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"

The Weekly Fix
from **BloombergMarkets**

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](#).

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
- ✓ 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

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