

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

/ First Class Service / Innovative Technology / IRS Accepted

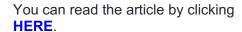
"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
July 25, 2023

### **Trust & Estate News**

This week's feature article is:
"Be Prepared" Should Be Your Estate
Planning Motto: A Real Story"

(Excerpt from actual article):

Independence, self-reliance, selfsufficiency, are all laudable goals for us as individuals. Independence is the hallmark of a well crafted and administered estate plan. But independence requires that you be prepared..



Last week's feature article was:
"How to Handle Estate Planning for
Multigenerational Living
Arrangements"

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



# **Helpful Hint**

This week's topic is:

"Broker statements and broker generated valuations are not always correct."

We can't count the number of times our customers ask us to prepare IRS Form 706 valuations for their clients that the corresponding brokerage firm got wrong. Many brokerage firms are not familiar with, nor apply, the stringent IRS regulations required for tax return valuations.

So, when you think about submitting the valuation you got for free from the broker, remember the phrase, "you get what you pay for" and double check it for accuracy.

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

## **Financial Market News**

This week's topic is:
"The Weekly Fix: Bonds Hear Siren
Call That Peak Rates Are Near"

#### **Excerpt (from actual article):**

A Bond investors are certain that central bank interest-rate increases are drawing to a close, fueling a strong bias to buy any dips.

There's still plenty of confusion though about what maximum levels rates will reach, how rapidly policy makers will pivot to cuts and just how harsh the expected economic slowdowns are going to be.

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
- ✓ 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

<u>Unsubscribe charles s rossmann@appraisenj.net</u>

Constant Contact Data Notice

Sent byeditor@appraisenj.netpowered by



Try email marketing for free today!