

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

August 1, 2023

Trust & Estate News

This week's feature article is:
"Aretha Franklin's Estate: Why Copyrights Require Estate Planning"

(Excerpt from actual article):
The news of the recent resolution of the Aretha Franklin estate is a high profile, and expensive, lesson in how not to manage copyrights in an estate.

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

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

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



Helpful Hint

This week's topic is:
"Pricing Money Market Funds"

A client recently asked why we were unable to price a Fidelity Money Market Mutual Fund. The answer was money market funds have no public trading value. They are priced dollar for dollar. We suggested to the client that they value it manually and provided instructions how to do it.

If you are not already a client, webappraisenj.com and our [outsourcing service](#), are quick and easy ways to get started with us. We also have software and software as a service options.

If you want more information, either call us at 201-784-8500 x103 or [EMAIL](#) us.

Last week's topic was:
"Broker statements and broker



generated valuations are not always correct."

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

Financial Market News

This week's topic is:
"Another Unanimous Fed Vote, But At What Cost?"

The Weekly Fix

from **Bloomberg**Markets

Excerpt (from actual article):

The Federal Reserve's decision to lift rates by 25 basis points this week was delivered via another unanimous vote, despite some vocal disagreements among Fed speakers in the weeks heading into the meeting. That's led to some raised eyebrows.

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

Upcoming Events

- 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

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- **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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