

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

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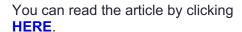
"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
August 8, 2023

Trust & Estate News

This week's feature article is:
"For Want of a Proper
Acknowledgement, Taxpayer Loses A
\$5.2 Million Deduction."

(Excerpt from actual article):

Previously, I discussed the impact of failure to get a goods thank you letter from a charity to be able to take a deduction for a charitable gift. The Tax Court has again denied a charitable deduction on the same grounds, now to the tune of \$5.2 million.



Last week's feature article was:
"Aretha Franklin's Estate: Why
Copyrights Require Estate Planning"
You can read last week's eNewsletter by
clicking HERE.

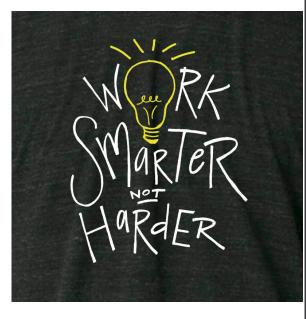


Helpful Hint

This week's topic is: "Gift Tax Valuations"

This week's feature Trust & Estate article references gift tax valuations. Did you know, in addition to estate tax valuations, we also provide gift tax valuations? These are the IRS Form 709 regulations we apply to our gift tax valuations.

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 are a ONESOURCE Trust & Estate Administration client, ESI-Direct makes the valuation process so much easier. 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:

"Pricing Money Market Funds"

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

Financial Market News

This week's topic is:

"No Country Has 'God-Given' Right To AAA Rating."

Excerpt (from actual article):

Fitch Ratings' surprise move to strip US government debt of its top-tier rating this week sparked passionate criticism from Washington and Wall Street alike, with Treasury Secretary Janet Yellen deriding the downgrade as "arbitrary." But to David Beers, former head of S&P Global Ratings' sovereign debt scoring committee and one of the analysts behind the controversial ratings cut in 2011, it's an important reminder that the US isn't entitled to the top grade.

You can read the article by clicking HERE.

The Weekly Fix

from **BloombergMarkets**

Upcoming Events

- 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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