

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

August 22, 2023

Trust & Estate News

This week's feature article is:
"Wealth Transfers Can Protect Families From Sunsetting Tax Breaks"

(Excerpt from actual article):
With many federal gift and estate tax exclusions set to expire, Baker Tilly's Michael Lum says now is the time to consider transferring family assets to protect intergenerational wealth.

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

Last week's feature article was:
"U.S. Appeals Court: Deathbed Checks Are Includible in Decedent's Estate"

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



Helpful Hint

This week's "Helpful Hint" is:
"Including sales, and other account activity, in your alternate valuation"

If you prepare alternate valuations which have transactions between the date of death and alternate date, Appraise allows you to input 17 unique types. They are: *called, cash, cash in lieu, distribution, exchange, fee, matured, merger, name change, redeemed, remark, reverse split, sold, spin off, split, transfer in, and transfer out*. This feature follows Generally Accepted Accounting Principles. For example, you can't sell more shares than you own. You can apply these transactions yourself, if you use our software or software as a service products, or we can apply them for you if you use our outsourcing service..



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. A full list of our delivery options, and valuation types, is available in the "**Maybe there is a better way?**" section of this eNewsletter.

**Last week's "Helpful Hint" was:
"Using SEDOL numbers to price international securities"**

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

Financial Market News

This week's topic is:
"On The Bright Side"

Excerpt (from actual article):

There's an optimistic argument to be made for why long-dated Treasury yields are screaming higher: bond investors have gone from bracing for a recession to pricing in a soft landing.

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

The Weekly Fix

from **Bloomberg**Markets

Upcoming Events

- Fri, Sep 1: We will be closing at 2:00p ET for the Labor Day holiday weekend.
- Mon, Sep 4: NASDAQ & NYSE markets closed for the Labor day holiday. We will be closed as well.
- Fri, Sep 8: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- Fri, Sep 15: (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.**



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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