

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

August 29, 2023

Trusts & Estates News

This week's Trust and Estate article is:
**"Portability of Deceased Spousal
Unused Exclusion Extended"**

(Excerpt from actual article):
Revenue Procedure 2022-32 (2022-30 IRB 101) became effective on July 8, 2022. This guidance issued by the IRS allows certain taxpayers an extended amount of time (five years) to make a "portability election" regarding estate and gift taxes.

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

Last week's Trust & Estate article was:
**"Wealth Transfers Can Protect
Families From Sunsetting Tax Breaks"**
You can read last week's eNewsletter by clicking [HERE](#).



Helpful Hint

This week's "Helpful Hint" is:
"Daily Dividends for Mutual Funds"
Many income-focused funds that invest primarily in bonds and money-market securities accrue their dividends on a daily basis despite being only paid out on a monthly or less frequent basis. Appraise clients have the option to include, or exclude, these daily dividends in their valuations.

If you are not already an ESI-Appraise 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:
"Including sales, and other account activity, in your alternate valuation"**

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

Financial Markets News

**This week's Financial Market news is:
"Powell's Jackson Hole speech has bonds a jitter"**

The Weekly Fix
from **BloombergMarkets**

Excerpt (from actual article):

This year's Jackson Hole symposium of central bankers is looming at least as large as previous gatherings with bond markets at, dare we say it, a pivotal point.

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

Last week's Financial Market news was: "On The Bright Side"

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

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

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- **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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