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Historical Stock & Bond Valuations for Trusts & Estates

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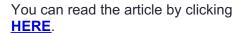
"Industry News, Helpful Hint, & Upcoming Events" eNewsletter September 19, 2023

Trusts & Estates News

This week's Trust and Estate article is: "Get Ready: Sneak Peek Of 2024 Tax Rates!"

(Excerpt from actual article):

Bloomberg has released its predictions for the tax rates in 2024. These predictions are based on the Chained Consumer Price Index for all Urban Consumers (C-CPI-U) data reported from September 2022 to August 2023 by the Bureau of Labor Statistics. The IRS relies on this data for annual adjustments to account for inflation. Here are the anticipated changes:



Last week's Trust & Estate article was: "Planning for Personal Property"

You can read last week's eNewsletter by clicking <u>HERE</u>.



Helpful Hint

This week's "Helpful Hint" is: "What is dirty price vs clean price of a bond?"

The dirty price is typically quoted between brokers and investors, but the clean price or the price without accrued interest is usually considered the published price. The clean price would likely be recorded in newspapers or financial resources that perform price tracking. Although the dirty price includes accrued interest, the clean price is often considered to be the value of the bond in the current market.

Last week's "Helpful Hint" was: "Pricing Securities Using Ticker Symbols"

You can read last week's eNewsletter by



Financial Markets News

This week's Financial Market news is: "ECB growth downgrades heighten stagnation fears"

The Weekly Fix from BloombergMarkets

Excerpt (from actual article):

The ECB on Thursday sent its clearest signal yet that it may be done with tightening after raising the deposit rate to 4%, the 10th straight increase.

What's worrying, though, is that inflation expectations measured by inflation swaps remain near historical highs. And crude oil keeps creeping up. Stagflation, anyone?

You can read the article by clicking **HERE**.

Last week's Financial Market news was: "Dollar bulls go hand-in-hand with higher yields"

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

Upcoming Events

Fri, Sep 29: (5:00p ET) System
 Maintenance - all online services
 will be unavailable with service
 being restored within a few hours.



Which valuations can I get from ESI-APPRAISE?

We give you access to all the tools, information, and professional support you need to increase your profits and serve your customers better. Additionally, ESI-Appraise offers a broad range of global securities and related financial data from all major markets and exchanges.

- IRS Form 706 Estate Tax Date of Date & Alternate Valuation Date
- IRS Form 709 Gift Tax
- IRS Form 8971 Beneficiaries
- IRS Form 1040/1041 Income Proration for Calendar or Fiscal Year
- Distributions
- Charitable Remainder Unitrusts
- Grantor Retained Annuity Trusts
- Capital Changes
- Cost Basis Calculator for Corporate Actions
- Cost Basis Calculator for Dividend Reinvestment Plans

How can I get a valuation from ESI-APPRAISE?

- 1. Secure online solutions (You do the work to save money.):
 - APPRAISE Web: credit card or account #; can be run from anywhere/any platform
 - APPRAISE.Windows: software and data stored on your computer
 - APPRAISE.SaaS: our Software as a Service (SaaS) solution. SaaS means we
 host the software, which you access via the internet, and you store your data
 locally on your computer. This benefits you and your information technology
 group because a hybrid solution takes the best of software and cloud and
 combines them. You're always running the current version and do not need to
 install updates. It's easy to add and remove users. It has more reports and
 features than traditional desktop software. You store your data securely on your
 computers.
 - **ESI-Direct:** ONESOURCE Trust & Estate securities valuations without valuation software. Everything is done from within the 706, reducing steps, saving time, and increasing accuracy.
 - Universal Import: A utility which enables users to create portfolios from comma delimited or Excel files in lieu of manually entering CUSIP/Ticker and shares. This works very well with exports from trust systems.
- 2. Outsourcing solution (We do the work and save you time.):

Valuations can be submitted/delivered via email, fax, overnight courier, or mail. Click <u>HERE</u> for an order form.

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