

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
September 26, 2023

Trusts & Estates News

This week's Trust and Estate article is:
**"What Clients Should Do As Clock
Runs Out On Estate Planning"**

(Excerpt from actual article):

Planners have long been talking about the sunset of the 2017 Tax Cuts and Jobs Act. Now with the 2026 deadline looming, they are focusing on some of the biggest potential changes affecting estates. They note that advisors have two years to plan, which is a short period of time in the estate planning business.

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

Last week's Trust & Estate article was:
**"Get Ready: Sneak Peek Of 2024 Tax
Rates!"**

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



Helpful Hint

This week's "Helpful Hint" is:
**"We now have call/put identifier
lookup & ticker symbol lookup!"**

We are pleased to announce that we have added two new research products!

1. If you are pricing options (calls & puts) and do not have the required identifier to do so, our new Options Lookup product may just be the answer you are looking for.
2. If you are pricing equities and funds and do not have the required identifier to do so, our new Ticker Symbol Lookup product may just be the answer you are looking for.



We are providing free access to these services through December 31, 2023.

Beginning January 1, 2024, a nominal subscription fee will be instituted. If you are a [webappraisenj](#) subscriber, these tools are integrated, and there will be no additional cost.

Here is a [short introductory video](#).

If you have questions, and/or want to **try the service for free until the end of the year**, please email techsupport@appraisenj.net or call 201-784-8500 x107.

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

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

Financial Market News

This week's Financial Market News is:
"Higher for Longer Fed Sends Bond Yields Soaring"

The Weekly Fix
from **BloombergMarkets**

Excerpt (from actual article):

The Federal Reserve's September meeting managed to be even more hawkish than markets had anticipated. Yields across the curve busted out to fresh multiyear highs — including the two-year rate jumping to 5.2% for the first time since well before the 2008 financial crisis.

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

Last week's Financial Market News was: "ECB growth downgrades heighten stagnation fears"

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
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 - Charitable Remainder Unitrusts
 - Grantor Retained Annuity Trusts
 - Capital Changes
 - Cost Basis Calculator for Corporate Actions
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-

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 [HERE](#) for an order form.

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