

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
November 21, 2023

Trusts & Estates News

This week's Trust and Estate article is:
"Debt Management in Estate Planning"

(Excerpt from actual article):
What if a client burdened with substantial debts or liabilities from their business unexpectedly passes away?

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

Last week's Trust & Estate article was:
"Maximizing Your 2023 Year-End Tax Planning Benefits"

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



Helpful Hint

This week's Helpful Hint is:
"Updated version of Appraise coming soon"

The current version, now in use, is 8.03. We will be releasing 8.04, a **minor but mandatory update**, in the next few weeks. When the new version is ready, the current software will let you know, and you will receive email alerts as well. Then proceed to download and install the update.

If you subscribe to our software as a service (APPRAISE.ASP) product, **you will receive the updated version automatically**. Here is how our software as a service model works. We host the APPRAISE software on our computers, which you access over the internet, and the client data is stored on your computers.

Last week's Helpful Hint was:
"Using Ticker Symbols With Appraise"
You can read last week's eNewsletter by



clicking [HERE](#).

If you want to speak with us, please:
call: 201-784-8500 x107
email: techsupport@appraisenj.net

Weekly Financial Market Review

Our business resides at the intersection of trust & estate law as well as financial data reporting.

We make it easy for our clients to stay current on financial market news by making a weekly market recap available by clicking [HERE](#).



Upcoming Events

(Subject to change - please monitor regularly)

- Wed, Nov 22: (2:00p ET) Early closing for the Thanksgiving holiday.
- Wed, Nov 22: (2:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- Fri, Nov 24: (1:00p ET) Early closing to coincide with the shortened trading days at the NASDAQ and NYSE. All online services will remain available.



Maybe there is a better way?

Why don't you consider us for your stock and bond valuations for trusts & estates?

Maybe there is a better way than how you are doing them now? We've been providing these valuations since 1985 and have experience and insight.

Keep reading for a list of valuations we provide and how you can get them.

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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.Cloud:** web product which can be run from anywhere
- **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. Your portfolio data is stored securely on your computers. It's easy to add and remove users.
- **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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Thank you for subscribing and allowing us to serve you.

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