

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

January 2, 2024

### Trusts & Estates News

This week's Trust and Estate article is:  
"The best estate planning stories of 2023"

(Excerpt from actual article):

Check out our selection of Financial Planning's 2023 coverage of estate planning. Learn how to sharpen your mind on practice areas ranging from working with couples to supporting artists and entertainers, to factoring caregiving into an estate plan.

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

Last week's Trust & Estate article was:  
"How to Prepare for Upcoming Estate Tax Law Changes"

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



### Helpful Hint

This week's Helpful Hint is:  
"Adjusted vs Unadjusted Prices"

We recently received a question from one of our clients asking why the price on our valuation for ticker symbol PRF, as of 07-03-2023, was different than the price reported on the month end brokerage statement. The reason is we report unadjusted prices - the price as it actually was on the valuation date. PRF had a 5:1 stock split on July 17. The brokerage statement retroactively adjusted the prices for the stock split. Since the shares used for the date of death valuation were pre-split, the unadjusted price should be used.

Last week's Helpful Hint was:  
"When can I send a portfolio for pricing if the valuation date is New Year's Day?"



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](mailto: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)

- Jan 8 - 12: We will be exhibiting at the 58th annual [Heckerling Institute on Estate Planning](#). Please visit us at our booth (#501) by the registration desk.
- Mon, Jan 15: Martin Luther King day holiday. Financial markets and ESI-APPRAISE closed.



## 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.

If you want to speak with us, please:  
call: 201-784-8500 x111  
email: [customerservice@appraisenj.net](mailto:customerservice@appraisenj.net)

---



## 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 installed 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.

## Are you the correct recipient of this eNewsletter?

Perhaps your coworker or colleague would benefit from the information contained in this eNewsletter. Please feel free to share it with them. They can then sign up for their own subscription by clicking on the link below.

[Sign up for ESI-APPRAISE notifications and weekly eNewsletters](#)

You can 'Safely Unsubscribe' by clicking on the link at the bottom of this eNewsletter.

Thank you for subscribing and allowing us to serve you.

---

**Evaluation Services, Inc.**  
180 OLD TAPPAN ROAD,

**Contact  
Us**

BUILDING 4, OLD TAPPAN, NJ  
07675  
(201) 784 8500  
[appraisenj.com](http://appraisenj.com)



Evaluation Services, Inc. | 180 OLD TAPPAN ROAD, BUILDING 4, OLD TAPPAN, NJ 07675

[Unsubscribe charles\\_s\\_rossmann@appraisenj.net](mailto:charles_s_rossmann@appraisenj.net)

[Constant Contact Data Notice](#)

Sent by [editor@appraisenj.net](mailto:editor@appraisenj.net) powered by



Try email marketing for free today!