

APPRAISE

By Evaluation Services, Inc.
Makes it Simple!

*Quick, Accurate, and Economical
Historical Stock & Bond Valuations
for Trusts and Estates*

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

August 13, 2024

Trusts & Estates News

This week's Trust and Estate article is:
"Back To School...Estate Planning?
POAs For College Bound Kids"

(Excerpt from actual article):

What is often lost amidst the flurry of college preparations is a discussion on estate planning...for the college bound kids. While the focus tends to be on the child's academic success in college, and rightfully so, there are crucial estate planning considerations that families should explore as children turn age 18 and head off to college. Specifically, families need to explore getting a health care power of attorney (HCPOA) and a financial power of attorney (FPOA) in place for their now adult children. Here is why these documents are vital:

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

Last week's Trust & Estate article was:
"Supreme Court Ruling In Loper Bright
Changes Estate Planning"

You can read last week's eNewsletter by



clicking [HERE](#).

Helpful Hint

**This week's Helpful Hint is:
"Gift Tax Regulations for Stocks & Bonds"**

Many of our clients use us for gift tax valuations as well as estate tax valuations. We are sometimes asked which IRS regulations do we apply to our valuations? Here is a [LINK](#) to the IRS regulations for stock and bond valuations for gift tax returns.



Please send us an [EMAIL](#) if you have questions.

**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](#).

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)

- **Tue, Aug 20:** (5:00p EDT) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- **Fri, Aug 30:** We will be closing at 2:00p ET for the Labor Day holiday weekend.
- **Mon, Sep 2:** NASDAQ & NYSE markets closed for the Labor day holiday. We will be closed as well.



Is there a better way to prepare your valuations?

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. Our pricing universe contains millions of US and foreign securities with corresponding decades of history. We can speak with you to potentially identify ways to improve accuracy, productivity, and output.



Click [HERE](#) 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

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,
BUILDING 4, OLD TAPPAN, NJ
07675
(201) 784 8500
appraisenj.com

Contact
Us



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

[Unsubscribe](#) | [Constant Contact Data Notice](#)



Try email marketing for free today!