

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter  
April 9, 2024

## Industry News

**This week's Trust and Estate article is:  
"IRS Form W-9 Changes And Their  
Impact On Trusts And Estates"**

**(Excerpt from actual article):**

In March 2024, the Internal Revenue Service (IRS) unveiled a revised version of Form W-9[1], Request for Taxpayer Identification Number and Certification, marking a significant update since its last revision in 2018. This change introduces new reporting requirements, particularly affecting flow-through entities such as trusts and estates.

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

**Last week's Trust & Estate article was:  
"SCOTUS Hears Arguments in Estate  
Tax Life Insurance Stock Redemption  
Case"**

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](#).



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## Helpful Hint

**This week's Helpful Hint is:  
"What do I do if a security with a  
legitimate CUSIP, SEDOL, or Ticker  
does not price?"**

Although our data vendor, [Intercontinental Exchange Inc.](#), has a very extensive pricing universe, they occasionally cannot price an issue for a particular day. If that is the case, we suggest to our clients two steps:

1. Contact us so we can



- independently verify with ICE your pricing situation.
2. If ICE affirms they are unable to price the issue, we suggest you reach out directly to the company in question for pricing history.

**Last week's Helpful Hint was:  
"Exporting trust and estate valuations  
to ONESOURCE Trust & Estate  
software"**

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)

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## Upcoming Events

(Subject to change - please monitor regularly)

- Thu, Apr 18: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- Thu, Apr 25: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.



## 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. We can speak with you to potentially identify ways to improve performance and accuracy without hiring additional people.

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



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