

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
July 30, 2024

Trusts & Estates News

This week's Trust and Estate article is:
**"Wealth Advisers Must Ensure Estates
Use Pre-Sunset Exclusion"**

(Excerpt from actual article):

Thanks to Inflation Reduction Act funding, the IRS has pushed to increase enforcement and compliance on above the 90th income percentile to close the \$688 billion tax gap. The focus on the highest income generators, through holdings in partnerships and as investors, means this demographic likely will see an increase in estate and gift tax audits—especially as the temporary gift tax exclusion comes closer to running out.

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

Last week's Trust & Estate article was:
**"A Crucial Window For Estate
Planning"**

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



Helpful Hint

This week's Helpful Hint is:
"Exporting ESI-APPRAISE valuations in ONESOURCE FPS & 706 Format"
However you get your valuations from us, you have the option of exporting the reports to a file which can be imported into ONESOURCE FPS & 706.



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

Last week's Helpful Hint was:
"Estate & Gift Tax Valuations in the Cloud"
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.



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:
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email: customerservice@appraisenj.net

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