

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
September 10, 2024

Trusts & Estates News

This week's Trust and Estate article is:
**"Navigating Estate Planning As The
TCJA Nears Expiration"**

(Excerpt from actual article):

As I've referenced in my last few articles, the Tax Cuts and Jobs Act (TCJA) expires at the end of 2025. This could be a big deal. While the upcoming election will likely determine whether it will happen, no one has a crystal ball. Given the potential for reduced estate tax exemptions, people with sizable portfolios may want to act now to make the most of their wealth. Below are some strategies to mitigate your tax burden while ensuring a smooth asset transfer.

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

Last week's Trust & Estate article was:
**"In both estate administration and
angling, it pays to prepare for the
unexpected"**

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



Helpful Hint

This week's Helpful Hint is:

"What is a daily dividend fund and how to include daily dividends which are earned, but not yet paid, in your Appraise valuation"

A daily dividend fund is an investment in which dividends are earned each day and, generally, paid monthly.

To include the daily dividends which are earned, but not paid, you need to go into system setup and toggle accrue unpaid dividends to "Y".

Last week's Helpful Hint was:

"How many decimal positions does NASDAQ carry prices out to?"

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)

- **Thu, Sep 19:** (5:00p EDT) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- **Sat, Sep 21:** (9:00a EDT) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- **Thu, Sep 26:** (11:30a EDT) September webinar - "APPRAISE API - Integrated Estate & Gift Tax Valuations"
- **Mon, Jan 13 to Fri, Jan 17:** We will be exhibiting at 59th Annual Heckerling Institute on Estate Planning.



Is there a better way to prepare your valuations?

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If you want to speak with us, please:
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Evaluation Services, Inc.

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

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