

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

November 28, 2023

Trusts & Estates News

**This week's Trust and Estate article is:
"Estate Tax Exemption Amount
Increases for 2024"**

(Excerpt from actual article):

The federal estate tax exemption amount is going up again for 2024. A higher exemption means more estates may be exempt from the federal tax, which can save heirs from a hefty tax bill. The amount is inflation-adjusted by the IRS each year. So, while the increase probably isn't a surprise, it's still a big deal for many wealthy taxpayers.

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

**Last week's Trust & Estate article was:
"Debt Management in Estate
Planning"**

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



Helpful Hint

**This week's Helpful Hint is:
"Gift tax valuations with and without
dividends"**

We receive requests for gift tax valuations with and without dividends. APPRAISE clients have the choice of both options. They can even toggle back and forth, within the same valuation, as needed.

**Last week's Helpful Hint was:
"Updated version of Appraise coming
soon"**

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

Live Product Demonstration

This month's Live Product Demo is: "IRS Form 8971 add on"

We developed an IRS Form 8971 add on to work in conjunction with APPRAISE portfolios. Clients can import an APPRAISE portfolio into the 8971 module and distribute the assets to the beneficiaries. This tool saves time and improves accuracy.



The live product demonstration is scheduled for: Thu, Dec 14 @ 11:30a ET.

It will run for 30 minutes.

You can register 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, Dec 14 (11:30a ET) "IRS Form 8971" Live Product Demonstration
- Thu, Dec 21: (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.

Keep reading for a list of valuations we provide and how you can get them.

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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.

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