

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter  
October 31, 2023

## Trusts & Estates News

This week's Trust and Estate article is:  
**"States That Won't Tax Your Death"**

(Excerpt from actual article):

How much will your children —or other heirs — pay when you die? That depends on whether you live in a state with no death tax.

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

Last week's Trust & Estate article was:  
**"It's Estate Planning Week: Here's How to Get Started"**

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



## Helpful Hint

This week's Helpful Hint is:  
**"Check Digits"**

We recently received this question:

*"I have six securities that were entered manually in Appraise and populated a different ninth digit in the Cusip than what was provided for each. Are you able to tell what the issue is with these six?"*

Here is the answer we provided:

*Our Appraise program automatically inserts the correct "check digit" for you. The purpose of the "check digit" is to ensure the Cusip number entered is a valid number.*

You can also use the link below to confirm the check digits.

<https://www.isindb.com/fix-cusip-calculate-cusip-check-digit/>

Last week's Helpful Hint was:  
**"Correctly valuing Mortgage Backed Securities for Estate & Gift Tax"**



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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## 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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## Upcoming Events

(Subject to change - please monitor regularly)

- Thu, Nov 2: (5:00p ET) System Upgrade - Appraise software as a service (ASP) will be unavailable and restored within a few hours.
- Thu, Nov 16: (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

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## 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 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.

## 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.

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Thank you for subscribing and allowing us to serve you.

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