

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

October 3, 2023

### Trusts & Estates News

This week's Trust and Estate article is:  
**"Uncertain Times Call for Creative Estate Planning Strategies"**

**(Excerpt from actual article):**

Flexibility in the estate planning process is key so you can adjust your plans to address changes in your goals or accommodate legislative shifts.

You can read the article by clicking

[HERE](#).

Last week's Trust & Estate article was:  
**"What Clients Should Do As Clock Runs Out On Estate Planning"**

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



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### Helpful Hint

This week's "Helpful Hint" is:  
**"Including CASH, and other user defined assets, in webappraise"**

[Webappraise](#) is our web based service for stock and bond valuations for trusts and estates. Users have the option of including CASH, or other user defined assets, in the valuations using our Global Assets List feature.

Last week's "Helpful Hint" was:  
**"We now have call/put identifier lookup & ticker symbol lookup!"**

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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## Financial Market News

This week's Financial Market News is:  
"Likely US Shutdown is Awkward For Everyone"

**The Weekly Fix**  
from **BloombergMarkets**

**Excerpt (from actual article):**

Barring an act of God or Congress, the US government will likely shut down this weekend. While that's typically a non-event for markets in the grand fullness of time, this particular episode lands at a sensitive juncture for Treasuries..

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

**Last week's Financial Market News was: "Higher for Longer Fed Sends Bond Yields Soaring"**

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

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## Upcoming Events

(Subject to change - please monitor regularly)

- Fri, Oct 13: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- Fri, Oct 27: (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 ask us about your stock and bond valuations for trusts & estates?

Maybe there is a better way than how you are doing them now?

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.

[Sign up for ESI-APPRAISE notifications and weekly eNewsletters](#)

You can 'Safely Unsubscribe' by clicking on the link at the bottom of this eNewsletter.

Thank you for subscribing and allowing us to serve you.

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