

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter  
September 12, 2023

## Trusts & Estates News

This week's Trust and Estate article is:  
**"Planning for Personal Property"**

(Excerpt from actual article):  
It's key to consider the emotional, financial, and tax implications of gifts of tangible personal property.

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

Last week's Trust & Estate article was:  
**"Trust's Incorrect Tax Form Forfeited Large Tax Refund Claim: A Lesson For Trustees"**

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



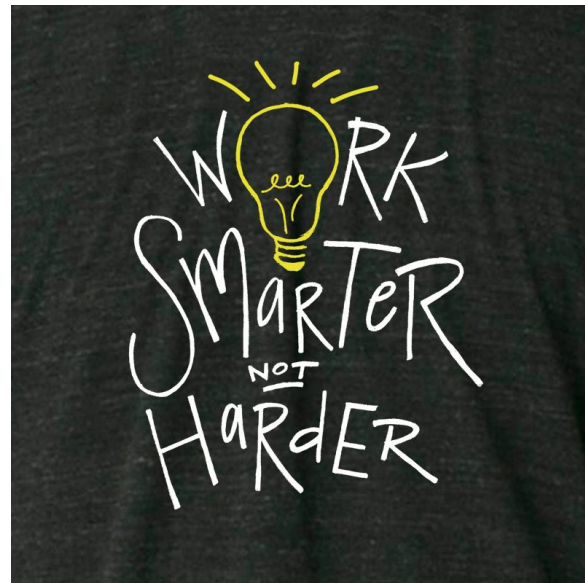
## Helpful Hint

This week's "Helpful Hint" is:  
**"Pricing Securities Using Ticker Symbols"**

Appraise users can use either CUSIP numbers or ticker symbols to price securities. If the symbol has a PR (preferred issue) in it, for example BAC.PRM, then enter it as BAC.M

Last week's "Helpful Hint" was:  
**"IRS Forms 1040 & 1041 Income"**

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



## Financial Markets News

This week's Financial Market news is:

"Dollar bulls go hand-in-hand with higher yields"

# The Weekly Fix

from **Bloomberg**Markets

## Excerpt (from actual article):

It looks like there's no stopping the bullet train otherwise known as the King Dollar, at least for now.

You can read the article by clicking

[HERE](#).

## Last week's Financial Market news was: "Screaming Buy' on the 10-Year Meets Skepticism"

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

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## Upcoming Events

- Fri, Sep 15: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.



## 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 Web](#): credit card or account #; can be run from anywhere/any platform
- **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. It's easy to add and remove users. It has more reports and features than traditional desktop software. You store your data securely on your computers.

- **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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