

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

August 8, 2023

Trust & Estate News

This week's feature article is:
"For Want of a Proper Acknowledgement, Taxpayer Loses A \$5.2 Million Deduction."

(Excerpt from actual article):
Previously, I discussed the impact of failure to get a goods thank you letter from a charity to be able to take a deduction for a charitable gift. The Tax Court has again denied a charitable deduction on the same grounds, now to the tune of \$5.2 million.

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

Last week's feature article was:
"Aretha Franklin's Estate: Why Copyrights Require Estate Planning"
You can read last week's eNewsletter by clicking [HERE](#).



Helpful Hint

This week's topic is:
"Gift Tax Valuations"
This week's feature Trust & Estate article references gift tax valuations. Did you know, in addition to estate tax valuations, we also provide gift tax valuations? These are the [IRS Form 709 regulations](#) we apply to our gift tax valuations.

If you are not already a client, [webappraisenj.com](#) and our [outsourcing service](#), are quick and easy ways to get started with us. If you are a ONESOURCE Trust & Estate Administration client, [ESI-Direct](#) makes the valuation process so much easier. We also have software and software as a service options.

If you want more information, either



call us at 201-784-8500 x103 or
[EMAIL](#) us.

Last week's topic was:
"Pricing Money Market Funds"

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

Financial Market News

This week's topic is:
"No Country Has 'God-Given' Right To
AAA Rating."

The Weekly Fix
from **BloombergMarkets**

Excerpt (from actual article):

Fitch Ratings' surprise move to strip US government debt of its top-tier rating this week sparked passionate criticism from Washington and Wall Street alike, with Treasury Secretary Janet Yellen deriding the downgrade as "arbitrary." But to David Beers, former head of S&P Global Ratings' sovereign debt scoring committee and one of the analysts behind the controversial ratings cut in 2011, it's an important reminder that the US isn't entitled to the top grade.

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

Upcoming Events

- Fri, Aug 11: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- Fri, Aug 18: (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.

If you want more information, either call us at 201-784-8500 x103 or [EMAIL](#) us.

There is no risk in asking, only possibilities.



These are the valuations we provide and how you can get them.

- ✓ IRS Form 706 Estate Tax Valuations
- ✓ IRS Form 709 Gift Tax Valuations
- ✓ CRUT & GRAT Valuations
- ✓ Corporate Actions, Splits, & Dividends
- ✓ Cost Basis for Dividend Reinvestment
- ✓ Form 8971 Reporting
- ✓ Allocate Income Between Form 1040 & 1041 for Calendar & Fiscal Year
- ✓ Fiduciary Accounting
- ✓ Cost Basis Calculator
- ✓ Domestic & International Securities

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- Valuations can be submitted/delivered via email, fax, overnight courier, or mail

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