

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

July 11, 2023

### Trust & Estate News

**This week's feature article is:**  
**"AICPA Recommends Changes to IRS Form 706-GS (D-1)"**

**(Excerpt from actual article):**  
The American Institute of CPAs (AICPA), provided the Department of the Treasury and the Internal Revenue Service (IRS) issues and recommendations for improvements to the Form 706-GS(D-1), Notification of Distribution from a Generation-Skipping Trust, and instructions and extensions, as well as guidance and regulations updates if Treasury and the IRS find that there are issues beyond changes to the form and instructions.

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

**Last week's feature article was:**  
**"Heirs Can Be Personally Liable For Estate's Taxes"**

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



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### Helpful Hint

**This week's topic is:**  
**"Bond Pricing"**

The topic of our financial news article this week (see next section of this eNewsletter) is **"Bonds crash as recession bets get vaporized."**

The article includes quite a few references to bond pricing. While equity pricing is relatively easy to find, bond valuations are much more difficult. All of our delivery methods: outsourcing, software, software as a service, and webappraise, include bond pricing.

If you are not already a client,

[webappraisenj.com](http://webappraisenj.com), is a quick and easy way to get started with us.

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

Last week's topic was:  
"New IRS Form 8971 product for Appraise clients"

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



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## Financial Market News

This week's topic is:  
"Bonds crash as recession bets get vaporized"

**Excerpt (from actual article):**

It really was deja vu all over again. The global bond rout accelerated into the end of the week as investors once more bailed on bets that an imminent recession would force central banks to halt interest-rate hikes and pivot toward cuts. Similar dynamics have played out at least three times during the last 18 months or so.

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

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

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## Upcoming Events

- Fri, Jul 21: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- Fri, Aug 4: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- 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



## Maybe there is a better way!

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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

#### **APPRAISE** Secure Online Solutions *(You produce the report and save money)*

- **APPRAISE** SaaS      SaaS means Software as a Service; We host the software eliminating upgrades; you save the portfolios on your computer for security
- **APPRAISE** Web      Everything is run from the internet using a credit card or account number
- **APPRAISE** Software      Software is installed on your computer and portfolios are saved there as well
- **APPRAISE** ESI-Direct      No valuation software; value your OTEA securities using the internet

#### **APPRAISE** Outsourcing Solutions *(We do the work using your list of assets and save you time)*

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

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