

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

June 27, 2023

Trust & Estate News

This week's feature article is:
"Heirs Can Be Personally Liable For Estate's Taxes"

(Excerpt from actual article):
The heirs of an estate can be liable to pay the estate or income taxes (and perhaps other obligations) of the estate.

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



Last week's feature article was:
"An Estate & Trust Professional's Four Takeaways From Tax Season 2023"

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

Helpful Hint

This week's topic is:
"New IRS Form 8971 product for Appraise clients"

This week's feature trust and estates article deals with beneficiaries. We have developed a new IRS Form 8971 product which imports Appraise portfolios and enables our clients to distribute the securities to the beneficiaries by percentage or dollar amount.

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

Last week's topic was:
"Gift Tax Valuations"
You can read last week's eNewsletter by clicking [HERE](#).



Financial Market News

This week's topic is:
"The Weekly Fix: A Long Hot Summer
for Bonds as Inflation Sizzles"

The Weekly Fix

from **Bloomberg**Markets

Excerpt (from actual article):

June has turned into a tough month for bonds. Investors are caught between their rock-hard consensus that rates will soon peak and the hard place of central banks that keep hiking to try and tame inflation.

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

Upcoming Events

- Mon, Jul 3: NASDAQ & NYSE markets closing at 1:00p for the Fourth of July holiday. We will be closing at 1:00p ET as well.
- Tue, Jul 4: NASDAQ & NYSE markets closed for the Fourth of July holiday. We will be closed as well



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

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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