

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter  
June 6, 2023

## Trust & Estate News

This week's feature article is:  
**"Five Estate Planning Lessons We Can Learn From Elvis' Mistakes"**

**Excerpt (from actual article):**  
Elvis' estate planning failures certainly adversely affected the life of his daughter, Lisa Marie, and have carried over into issues with her estate.

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

Last week's feature article was:  
**"How to Tackle Digital Estate Planning in Four Easy Steps"**

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



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## Helpful Hint

This week's topic is:  
**"Our New IRS Form 8971 Product"**  
We introduced a new IRS Form 8971 reporting product for distribution to beneficiaries. If you would like to see an introduction video, please [EMAIL](#) us.

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



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## Financial Market News

This week's topic is:  
"The Weekly Fix: The Fed Should Just  
Go Ahead and Hike in June"

**Excerpt (from actual article):**

With less than two weeks until the Federal Reserve's June rate decision, bond traders have almost completely bought into the "skip" sequencing: swaps show that a pause is more likely than not in June, followed by a four-in-five chance that rates rise by July.

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

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## Upcoming Events

- Fri, Jun 16: We will be closing at 3:00p ET for the Juneteenth holiday weekend.
- Mon, Jun 19: NASDAQ & NYSE markets closed for Juneteenth Day holiday. We will be closed as well.
- Fri, Jun 23: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.



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## 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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- **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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