

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

May 16, 2023

Trust & Estate News

This week's feature article is:
"Estate Planning Strategies For Gen Z Beneficiaries"

Excerpt (from actual article):

Estate plans are frequently designed to create a legacy that extends beyond a single generation. For this reason, if you are creating an estate plan, you may wish to consider the characteristics of the younger generations—particularly Gen Z—to ensure your estate planning goals are met.

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

Last week's feature article was:
"IRS: Gifts to Irrevocable Grantor Trust Will Not Receive Basis Step-Up At Death"

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



Helpful Hint

This week's topic is:
"Embracing Gen-Z's Zealous Use of Technology"

One of the points of this week's feature Trust & Estate news article is that Gen-Z is zealous about their use of technology. We have found that this generation is embracing our [webappraise platform](#) because they can generate valuations from anywhere on any device.

Last week's topic was:
"Which dividends are included in date of death valuations?"

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



Financial Market News

This week's topic is:
"The Weekly Fix: Debt Ceiling Roulette
Adds to Recession Angst"

The Weekly Fix

from **Bloomberg**Markets

Excerpt (from actual article):
As the US debt ceiling deadline gets closer and closer, signs of alarm are starting to spread across markets.

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

Upcoming Events

- Fri, May 19: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- Fri, May 26: (2:30p ET) Support will be closing early for the Memorial Day Holiday.



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.

Either call us at 201-784-8500 x111 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** 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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