

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

May 9, 2023

### Trust & Estate News

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

**Excerpt (from actual article):**

"The IRS has confirmed its view that when assets are gifted to an irrevocable grantor trust and not included in the grantor's estate, the trust assets will not receive a step-up in basis at the death of the grantor."

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

Last week's feature article was:  
**"Avoiding Taxes on the Sale or Gifting of Art"**

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



### Helpful Hint

This week's topic is:  
**"Which dividends are included in date of death valuations?"**

We received a question last week from a client asking how do we decide which dividends should appear on an estate tax valuation. We informed her these are the [regulations we apply](#) when preparing a date of death or alternate date valuation.

Last week's topic was:  
**"Always Current, Always Secure"**

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



### Financial Market News

This week's topic is:  
"Maybe Those 2023 Fed Cut Bets  
Aren't That Crazy"

It was a toss-up between what to start the newsletter with this week. What's more significant: likely the **last rate hike** of the most aggressive Federal Reserve tightening cycle since the 1980s? Or the fourth **collapse** of a US bank in under two months?

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

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## 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.



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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.

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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