

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

May 2, 2023

### Industry News

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

**Excerpt (from actual article):**

"There are several ways that a donor can use the tax-exempt status of a charity to reduce and defer taxes on transactions. This is especially relevant to artists and their family when it comes to artwork."



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

Last week's feature article was:  
**"How Estates Can Reduce a Double Death Tax on Decedents' Income"**

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

We are considering enhancing our existing IRS Form 1040/1041 reporting tool which carves out interest and dividends accrued before and after death. Is this a product you would be interested in?

[Please take our two question survey.](#)

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### Helpful Hint

This week's topic is:  
**"Always Current, Always Secure"**

One of our clients, who was a software subscriber but recently switched to our Appraise.ASP software as a service solution, asked if they needed to install any updates to be on the latest version. We explained that our ASP clients are always current because the application is hosted on our servers and the data is stored on the client's computer. **Always Current, Always Secure...that is the Appraise.ASP promise.**

If you want us to email you about

Appraise.ASP, please click [HERE](#).

Last week's topic was:  
"Simplifying IRS Form 1040 and 1041  
preparation."

You can read last week's eNewsletter 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

**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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