

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

March 21, 2023

Industry News

This week's feature article is:
"Six Reasons Tax Season Should Also Be Estate Planning Season"

Excerpt (from actual article):
"Helping improve your clients' estate plans can ensure their financial wellness for generations to come."

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



Last week's feature article was:
"Top things for estate planners to do before Tax Day 2023"

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

Helpful Hint

This week's topic is:
"Using SEDOL numbers to price international securities"

We have the ability to price international securities using SEDOL numbers. The stock exchange daily official list (SEDOL) is a seven-character identification code assigned to securities that trade on the London Stock Exchange and various smaller exchanges in the United Kingdom. SEDOL codes are used for unit trusts, investment trusts, insurance-linked securities, and domestic and foreign stocks. SEDOL codes are comparable to CUSIP numbers, which are codes issued by the Committee on Uniform Securities Identification Procedures for stocks traded in the United States.



Last week's topic was:
"Pricing Multiple Portfolios Simultaneously"

You can read last week's eNewsletter by

clicking [HERE](#).

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?

There is a list of the valuations we provide, and how you can get them, further along in this eNewsletter.

Either call us at 201-784-8500 x111 or [EMAIL US](#).

There is no risk in asking, only possibilities.



Upcoming Events

- Fri, Mar 24: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.



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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