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Historical Stock & Bond Valuations for Trusts & Estates
✓ First Class Service ✓ Innovative Technology ✓ IRS Accepted

Industry News

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

Excerpt (from actual article):
"What estate planners need to accomplish for their clients before Tax Day, as well as the regulatory changes they need to be aware of while preparing for the big day."

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

Last week's feature article was:
"Estate Planning for Memorabilia Collectors: Don't Leave Your Family in the Lurch"

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



Helpful Hint

This week's topic is:
"Pricing Multiple Portfolios Simultaneously"

During Charitable Remainder Unitrust (CRUT) season, many of our clients take advantage of a standard Appraise feature which **allows the user to price multiple portfolios at the same time**. Some clients send two whereas others send 20. This can be a tremendous time saver, especially when it is used in conjunction with **Appraise Universal Import, which automates the process of creating portfolios**.

If you want to learn more, please [EMAIL US](#).

Last week's topic was:
"Stock Splits"



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

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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