

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

May 30, 2023

Trust & Estate News

This week's feature article is:
"How to Tackle Digital Estate Planning in Four Easy Steps"

Excerpt (from actual article):

Your digital life includes dozens of usernames and passwords. Providing a digital estate plan can help your family deal with your accounts with minimal fuss.

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

Last week's feature article was:
"8 estate planning tips for advisors with artists and entertainer clients"

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



Helpful Hint

This week's topic is:
"Digital Estate Valuations"

This week's trust and estate feature article discusses digital estate planning which is becoming more essential as people embrace the power of the internet. The same phenomenon is happening in estate valuations as customers migrate the pricing and accrual function to the internet. If this is something you want to consider, we have two options:

1. webappraisenj.com
2. [API calls](#) from your computer

If you want more information, either call us at 201-784-8500 x103 or [EMAIL](#) us.

Last week's topic was:
"Which browser(s) work best with webappraise for estate and gift tax valuations?"

You can read last week's eNewsletter by



clicking [HERE](#).

Upcoming Events

- Mon, Jun 19: NASDAQ & NYSE markets closed for Juneteenth Day holiday. We will be closed as well
- Fri, Jun 23: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.



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.

If you want more information, either call us at 201-784-8500 x103 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** 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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