

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

June 13, 2023

Trust & Estate News

This week's feature article is:

"Biden Administration's Green Book Proposes Dramatic Estate Planning Changes"

Excerpt (from actual article):

The Biden Administration recently released its fiscal 2024 revenue proposal, which includes many dramatic changes that will affect most aspects of estate planning. The first reaction of many is that this will not be passed with a Republican-controlled House. Although that might be true, one should never say never when it comes to Congressional action. With debt ceiling negotiations looming, there is no telling what deals might be made, even deals that might include one or more of the Biden Administration's proposed estate tax changes. It is also important to note that many aspects of the administration's estate tax proposals have circulated in similar forms for many years. Thus, even if these changes are dodged this round, they might not be avoided forever.

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

Last week's feature article was:

"Five Estate Planning Lessons We Can Learn From Elvis' Mistakes"

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



Helpful Hint

This week's topic is:

"Did you know you can include assets other than stocks and bonds in an APPRAISE valuation?"

Many of our clients, in order to do complete reporting, include assets which are not securities in their APPRAISE

valuations. Two examples are cash and certificates of deposit. You can manually enter description, pricing data, and accruals/dividends.

If you would like instructions how to do this, please [EMAIL US](#).

Last week's topic was:

"Our New IRS Form 8971 Product"

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



Financial Market News

This week's topic is:

"The Weekly Fix: Hawks Fly in Northern Summer to Hunt Down Bonds"

The Weekly Fix
from **BloombergMarkets**

Excerpt (from actual article):

Bond investors got hit with nasty surprises from both ends of the Earth this week as **Australia** and **Canada** hiked interest rates when the consensus was they would hold fire. Policymakers simply don't share the market's confidence that inflation will cool down — as JPMorgan Asset Management's Karen Ward put it, investors got **carried away** by hopes for rapid rate cuts. That enhanced the **slump** that hit bonds this week as investors once more found they'd underestimated central banks' hawkish mindset. That sets up more potential for turmoil given that traders are again looking extremely sure that the Federal Reserve will hold on June 14, while its European peer will hike by a quarter point.

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

Upcoming Events

- Fri, Jun 16: We will be closing at 3:00p ET for the Juneteenth holiday weekend.
- 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 | ✓ Form 8971 Reporting |
| ✓ IRS Form 709 Gift Tax Valuations | ✓ Allocate Income Between Form 1040 & 1041 for Calendar & Fiscal Year |
| ✓ CRUT & GRAT Valuations | ✓ Fiduciary Accounting |
| ✓ Corporate Actions, Splits, & Dividends | ✓ Cost Basis Calculator |
| ✓ Cost Basis for Dividend Reinvestment | ✓ Domestic & International Securities |

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