

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

July 25, 2023

### Trust & Estate News

This week's feature article is:  
**"Be Prepared" Should Be Your Estate Planning Motto: A Real Story"**

**(Excerpt from actual article):**  
Independence, self-reliance, self-sufficiency, are all laudable goals for us as individuals. Independence is the hallmark of a well crafted and administered estate plan. But independence requires that you be prepared..



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

Last week's feature article was:  
**"How to Handle Estate Planning for Multigenerational Living Arrangements"**

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

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### Helpful Hint

This week's topic is:  
**"Broker statements and broker generated valuations are not always correct."**

We can't count the number of times our customers ask us to prepare IRS Form 706 valuations for their clients that the corresponding brokerage firm got wrong. Many brokerage firms are not familiar with, nor apply, the stringent IRS regulations required for tax return valuations.

So, when you think about submitting the valuation you got for free from the broker, remember the phrase, "you get what you pay for" and double check it for accuracy.

If you are not already a client, [webappraisenj.com](http://webappraisenj.com) and our [outsourcing service](#), are quick and easy



ways to get started with us.

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

Last week's topic was:  
"Bond Pricing...Again"

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

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## Financial Market News

This week's topic is:  
"The Weekly Fix: Bonds Hear Siren Call That Peak Rates Are Near"

**The Weekly Fix**  
from **BloombergMarkets**

**Excerpt (from actual article):**

A Bond investors are certain that central bank interest-rate increases are drawing to a close, fueling a strong bias to buy any dips.

There's still plenty of confusion though about what maximum levels rates will reach, how rapidly policy makers will pivot to cuts and just how harsh the expected economic slowdowns are going to be.

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

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## Upcoming Events

- Fri, Jul 28: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- Fri, Aug 4: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- Fri, Aug 11: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- Fri, Aug 18: (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!

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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

## **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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Thank you for subscribing and allowing us to serve you.

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