

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

September 5, 2023

Trusts & Estates News

This week's Trust and Estate article is:
**"Trust's Incorrect Tax Form Forfeited
Large Tax Refund Claim: A Lesson For
Trustees"**



(Excerpt from actual article):

Trust lost a large tax refund because it sought because it filed on the wrong form. So the moral of this tax tale is that you have to be careful about making sure you file the right tax form to get what you want..

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

**Last week's Trust & Estate article was:
"Portability of Deceased Spousal
Unused Exclusion Extended"**

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

Helpful Hint

This week's "Helpful Hint" is:
"IRS Forms 1040 & 1041 Income"

Our Trusts & Estate news article contains a reference to the IRS Form 1041, U.S. Income Tax Return for Estates and Trusts. Did you know that we have a valuation which calculates and prorates the dividends to a decedent's final income (Form 1040) and trust/estate (Form 1041) tax returns for a [calendar](#) or [fiscal](#) year. You can create a new portfolio or import an existing date of death portfolio.



If you are not already an ESI-Appraise client, webappraisenj.com and our [outsourcing service](#), are quick and easy ways to get started with us.

If you are a ONESOURCE Trust & Estate Administration client, [ESI-Direct](#) makes the valuation process so much easier. A full list of our delivery options, and valuation types, is available in the **"Maybe there is a better way?"** section of this eNewsletter.

Last week's "Helpful Hint" was:

"Daily Dividends for Mutual Funds"

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

Financial Markets News

This week's Financial Market news is: **"'Screaming Buy' on the 10-Year Meets Skepticism"**

The Weekly Fix
from **BloombergMarkets**

Excerpt (from actual article):

My favorite type of sentence is one that includes both "screaming" and "Treasury" in it. Luckily for me, Ian Lyngen of BMO Capital Markets delivered a beauty this week..

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

Last week's Financial Market news was: **"Powell's Jackson Hole speech has bonds a jitter"**

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

Upcoming Events

- Fri, Sep 8: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- Fri, Sep 15: (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.



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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