

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

September 19, 2023

Trusts & Estates News

This week's Trust and Estate article is:
"Get Ready: Sneak Peek Of 2024 Tax Rates!"

(Excerpt from actual article):

Bloomberg has released its predictions for the tax rates in 2024. These predictions are based on the Chained Consumer Price Index for all Urban Consumers (C-CPI-U) data reported from September 2022 to August 2023 by the Bureau of Labor Statistics. The IRS relies on this data for annual adjustments to account for inflation. Here are the anticipated changes:

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

Last week's Trust & Estate article was:
"Planning for Personal Property"

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



Helpful Hint

This week's "Helpful Hint" is:
"What is dirty price vs clean price of a bond?"

The dirty price is typically quoted between brokers and investors, but the clean price or the price without accrued interest is usually considered the published price. The clean price would likely be recorded in newspapers or financial resources that perform price tracking. Although the dirty price includes accrued interest, the clean price is often considered to be the value of the bond in the current market.

Last week's "Helpful Hint" was:
"Pricing Securities Using Ticker Symbols"

You can read last week's eNewsletter by



clicking [HERE](#).

Financial Markets News

This week's Financial Market news is: "ECB growth downgrades heighten stagnation fears"

The Weekly Fix

from **Bloomberg**Markets

Excerpt (from actual article):

The ECB on Thursday sent its clearest signal yet that it may be done with tightening after raising the deposit rate to 4%, the 10th straight increase.

What's worrying, though, is that inflation expectations measured by inflation swaps remain near historical highs. And crude oil keeps creeping up. Stagflation, anyone?

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

Last week's Financial Market news was: "Dollar bulls go hand-in-hand with higher yields"

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

Upcoming Events

- Fri, Sep 29: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.



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- Capital Changes
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- Cost Basis Calculator for Dividend Reinvestment Plans

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