

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

December 12, 2023

## Trusts & Estates News

This week's Trust and Estate article is:  
**"How Financial Advisors Can Seize Opportunities in the \$129T Wealth Transfer"**



**(Excerpt from actual article):**

Wealth managers have a unique opportunity to highlight their digital capabilities during the estate administration process. Advances in technology like AI and automation have made it possible for advisors to effortlessly add trust and estate administration services to their practices. Unlike traditional estate planning, serving as an administrator does not require an advisor to become an estate planning specialist. Rather, with the right technological support, they can play a critical role in quarterbacking the estate process, ensuring that their client's wishes are carried out as planned, and showcasing their skills to beneficiaries—their potential new clients. Here's how:

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

**Last week's Trust & Estate article was:**  
**"6 Effective Gifting Strategies To Minimize Your Estate Taxes"**

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

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## Helpful Hint

**This week's Helpful Hint is:**  
**"CRUT & GRAT Valuations"**

Last week, our featured trusts and estates news article was titled, "[6 Effective Gifting Strategies to Minimize Your Estate Taxes](#)." Within the article, two of the strategies suggested were creating a Charitable Remainder Trust or a Grantor Retained Annuity Trust. We

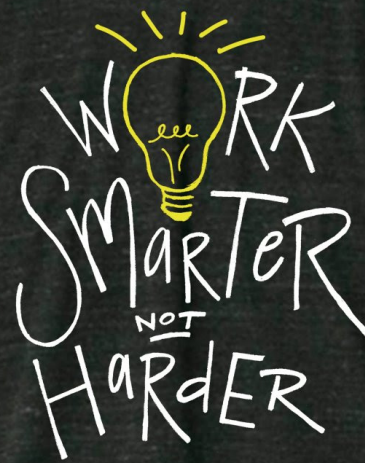
can help you with the valuations required for these. Some of our clients, particularly for yearend charitable remainder unitrust reporting, have automated the process so that the assets are extracted from the trust system and uploaded into APPRAISE seamlessly. They then price 10+ portfolio valuations at the same time.

Please contact us for more information about these valuations and the automation process.

**Last week's Helpful Hint was:**  
**"Why is there no interest accrual for the U.S. Treasuries bills?"**

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

If you want to speak with us, please:  
call: 201-784-8500 x107  
email: [techsupport@appraisenj.net](mailto:techsupport@appraisenj.net)



WORK  
SMARTER  
NOT  
HARDER

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## Live Product Demonstration

**This month's Live Product Demo is:**  
**"IRS Form 8971 add on"**

We developed an IRS Form 8971 add on to work in conjunction with APPRAISE portfolios. Clients can import an APPRAISE portfolio into the 8971 module and distribute the assets to the beneficiaries. This tool saves time and improves accuracy.

The product demonstration is scheduled for: Thu, Dec 14 @ 11:30a ET.  
It will run for 30 minutes.  
You can register by clicking [HERE](#).



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## Weekly Financial Market Review

**Our business resides at the intersection of trust & estate law as well as financial data reporting.**

We make it easy for our clients to stay current on financial market news by making a weekly market recap available by clicking [HERE](#).



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## Upcoming Events

**(Subject to change - please monitor regularly)**

- Thu, Dec 14 (11:30a ET) "IRS Form 8971" Live Product Demonstration
- Thu, Dec 14: (3:00p ET) We are upgrading our email server and will not be able to send or receive email until later in the evening. If you need us after 3:00p, please call.
- Fri, Dec 22: (3:00p ET) Early close for the Christmas holiday.
- Thu, Dec 28: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- Fri, Dec 29: (3:00p ET) Early close for the New Year holiday.



## Maybe there is a better way?

Why don't you consider us for your stock and bond valuations for trusts & estates?

Maybe there is a better way than how you are doing them now? We've been providing these valuations since 1985 and have experience and insight.

Keep reading for a list of valuations we provide and how you can get them.

If you want to speak with us, please:  
call: 201-784-8500 x111  
email: [customerservice@appraisenj.net](mailto:customerservice@appraisenj.net)



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## Which valuations can I get from ESI-APPRAISE?

We give you access to all the tools, information, and professional support you need to increase your profits and serve your customers better. Additionally, ESI-Appraise offers a broad range of global securities and related financial data from all major markets and exchanges.

- IRS Form 706 Estate Tax Date of Date & Alternate Valuation Date
  - IRS Form 709 Gift Tax
  - IRS Form 8971 Beneficiaries
  - IRS Form 1040/1041 Income Proration for Calendar or Fiscal Year
  - Distributions
  - Charitable Remainder Unitrusts
  - Grantor Retained Annuity Trusts
  - Capital Changes
  - Cost Basis Calculator for Corporate Actions
  - Cost Basis Calculator for Dividend Reinvestment Plans
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# How can I get a valuation from ESI-APPRAISE?

## 1. Secure online solutions (You do the work to save money.):

- **APPRAISE.Cloud:** web product which can be run from anywhere
- **APPRAISE.Windows:** software installed and data stored on your computer
- **APPRAISE.SaaS:** our Software as a Service (SaaS) solution. SaaS means we host the software, which you access via the internet, and you store your data locally on your computer. This benefits you and your information technology group because a hybrid solution takes the best of software and cloud and combines them. You're always running the current version and do not need to install updates. Your portfolio data is stored securely on your computers. It's easy to add and remove users.
- **ESI-Direct:** ONESOURCE Trust & Estate securities valuations without valuation software. Everything is done from within the 706, reducing steps, saving time, and increasing accuracy.
- **Universal Import:** A utility which enables users to create portfolios from comma delimited or Excel files in lieu of manually entering CUSIP/Ticker and shares. This works very well with exports from trust systems.

## 2. Outsourcing solution (We do the work and save you time.):

Valuations can be submitted/delivered via email, fax, overnight courier, or mail. Click [HERE](#) for an order form.

## Are you the correct recipient of this eNewsletter?

Perhaps your coworker or colleague would benefit from the information contained in this eNewsletter. Please feel free to share it with them. They can then sign up for their own subscription by clicking on the link below.

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Thank you for subscribing and allowing us to serve you.

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