

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

January 9, 2024

Trusts & Estates News

This week's Trust and Estate article is:
"Spreading the Love: Tax Savings strategies for Wealth Transfer"

(Excerpt from actual article):

Use These Smart Planning Tips to Set the Stage for Your Loved Ones' Futures.

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

Last week's Trust & Estate article was:
"How to Prepare for Upcoming Estate Tax Law Changes"

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



Helpful Hint

This week's Helpful Hint is:
"58th Annual Heckerling Institute"

We are exhibiting at the 58th Annual Heckerling Institute on Estate Planning in Orlando from January 8 to 12. Our booth (#501) is in the same place as past years, right next to the registration area, and across from the walkway to the sessions.

We attend the Institute annually, primarily for three reasons:

1. We appreciate the opportunity to meet our clients, friends, and subscribers.
2. The institute keeps us current on the issues affecting our industry.
3. People can stop by our booth to discuss if there is a better way to prepare their estate, gift, and trust valuations than how they do them now.



**Last week's Helpful Hint was:
"Adjusted vs Unadjusted Prices"**

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

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](#).



Upcoming Events

(Subject to change - please monitor regularly)

- Jan 8 - 12: We will be exhibiting at the 58th annual [Heckerling Institute on Estate Planning](#). Please visit us at our booth (#501) by the registration desk.
- Mon, Jan 15: Martin Luther King day holiday. Financial markets and ESI-APPRAISE closed.
- Thu, Jan 18: (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.
- Thu, Jan 25: (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 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.



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email: customerservice@appraisenj.net

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

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.

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