

APPRAISE

By Evaluation Services, Inc.
Makes it Simple!

*Quick, Accurate, and Economical
Historical Stock & Bond Valuations
for Trusts and Estates*

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
June 11, 2024

Trusts & Estates News

This week's Trust and Estate article is:
"IRS can tax death benefits used to
purchase stocks, high court rules"

(Excerpt from actual article):

The justices said the IRS could seek an
additional \$1 million for the death benefits
used in a stock handoff deal.

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

Last week's Trust & Estate article was:
"How To Avoid Faulty Advice On IRS
Form 706 And The Portability
Election"

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



Helpful Hint

This week's Helpful Hint is:
"How are CUSIP numbers derived?"
We were asked, "How are CUSIP

numbers derived?"
Please click [HERE](#) for an answer.

**Last week's Helpful Hint was:
"SEDOL Valuation Date Question"**
You can read last week's eNewsletter by
clicking [HERE](#).



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)

- Wed, Jun 19: We will be closed for the NASDAQ & NYSE Juneteenth holiday. All online services will be available.
- Thu, Jun 20: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.



Is there a better way to prepare your valuations?

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. Our pricing universe contains millions of US and foreign securities with corresponding decades of history. We can speak with you to potentially identify ways to improve accuracy, productivity, and output.



Click [HERE](#) 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

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