

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
August 6, 2024

Trusts & Estates News

This week's Trust and Estate article is:
**"Supreme Court Ruling In Loper
Bright Changes Estate Planning"**

(Excerpt from actual article):

A recent Supreme Court case will change the dynamic of key aspects of tax planning, including estate tax planning: *Loper Bright Enterprises v. Raimondo*, 603 U.S. ____ (2024). There was also a companion case, *Relentless v. Department of Commerce*. As Ed Sullivan would say, this is "a really big show." While this may all seem a bit nuanced and technical, it could be valuable to understand how the tax ground rules have just changed.

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

Last week's Trust & Estate article was:
**"Wealth Advisers Must Ensure Estates
Use Pre-Sunset Exclusion"**

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



Helpful Hint

This week's Helpful Hint is:

"Including sales, and other account activity, in your alternate valuation"

If you prepare alternate valuations which have transactions between the date of death and alternate date, Appraise allows you to input 17 unique types. They are: *called, cash, cash in lieu, distribution, exchange, fee, matured, merger, name change, redeemed, remark, reverse split, sold, spin off, split, transfer in, and transfer out.* This feature follows Generally Accepted Accounting Principles. For example, you can't sell more shares than you own. You can apply these transactions yourself, if you use our software or software as a service products, or we can apply them for you if you use our outsourcing service.



Please send us an [EMAIL](#) if you have questions.

Last week's Helpful Hint was:

"Exporting ESI-APPRAISE valuations in ONESOURCE FPS & 706 Format"

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)

- **Tue, Aug 20:** (5:00p EDT) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- **Fri, Aug 30:** We will be closing at 2:00p ET for the Labor Day holiday weekend.
- **Mon, Sep 2:** NASDAQ & NYSE



markets closed for the Labor day holiday. We will be closed as well.

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?

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