

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

November 25, 2024

Trusts & Estates News

This week's Trust and Estate article is:
"Estate and Inheritance Taxes by State, 2024"

(Excerpt from actual article):

In addition to the federal estate tax, with a top rate of 40 percent, 12 states and the District of Columbia impose additional estate taxes, while six states levy inheritance taxes. Maryland is the only state that imposes both an estate and an inheritance tax.

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

Last week's Trust & Estate article was:
"Trump Presidency: Yes, Estate Planning Is Still Important"

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



Helpful Hint

This week's Helpful Hint is:
"Why are these prices higher than I expected?"

A client asked this week, "Why are these prices higher than I expected?" This is the answer we provided:

The values you were looking at from the other source are lower, post-split, adjusted, prices. The Stock Split of 10:1 occurred on 07-15-2024. This is after the valuation date of 07-05-2024, which means that the date of death valuation requires pre-split, unadjusted, prices and pre-split shares.

Pre-split (Before 07-15-2024, Valuation Date => 07-05-2024):

High => \$1765.47

Low => \$1696.00



Mean => \$1730.74
Post-split (On or After 07-15-2024, these values would not apply before 07-15-2024):

High => \$173.51

Low => \$169.26

Mean => \$171.39

Shares would need to be adjusted to reflect 10:1 stock split.

If you have questions, you can [EMAIL US](#) for more information.

We explain the six innovative methods we have for obtaining valuations from us in the "**Is there a better way to prepare your valuations**" section of this eNewsletter.

Last week's Helpful Hint was:
"Software as a Service clients have updates applied automatically"

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)

- **Thu, Nov 21:** (11:30a EST) Webinar for our clients explaining what to look for in the new version of our APPRAISE software.
- **Wed, Nov 27:** (2:00p EST) ESI-APPRAISE Customer Service / Technical Support will be closing early for the Thanksgiving Holiday. All online systems will be available.
- **Fri, Nov 28:** (1:00p EST) The NASDAQ & NYSE exchanges are closing at 1:00p ET. ESI-APPRAISE Customer service / Technical Support will be closing at 1:00p ET as well. All online systems will be available.



- **Thu, Dec 5:** (5:00p EST) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- **Mon, Jan 13 to Fri, Jan 17:** We will be exhibiting at the 59th annual Heckerling Institute on Estate Planning. Plan on stopping by to visit us.

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.



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

- **APPRAISE.API:** a secure interface that streamlines portfolio pricing. This is done by allowing clients to program directly from their trust system into our proprietary pricing system and customize it for their reporting needs. No personal or client data is exchanged. This can be a way to cut costs, improve efficiency, and improve your processing metrics.
- **APPRAISE.Web:** A web-based application, accessed through any browser, that provides stock and bond valuations for estate, gift, and trust tax. Portfolios are saved to your account and accessible wherever you are, on any device.
- **APPRAISE.Software:** Our proprietary software that has been serving our clients since 1985. Install it on any computer and get the estate, gift, and trust tax valuations you need quickly, accurately, and securely.
- **APPRAISE.SaaS:** Software as a Service (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 web 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. The underlying technology is Citrix.
- **ESI-Direct:** Thomson Reuters ONESOURCE Trust & Estate securities valuations without valuation software. Everything is done from within the Accounting or 706, reducing steps, saving time, and increasing accuracy.

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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