This week's feature article is:
Estate Planning Tip: Creditor Protection for IRAs & Beneficiaries
Here is an excerpt from the article:
"This is Part 1 of a 4-part article on the interplay of changes to state laws with the current uncertainty in the federal estate and gift tax laws. In this part, we'll explore the inter-relationship of a decoupled state (using New Jersey and its recent estate tax repeal as an example) and planning in an uncertain environment."
You can access the complete article by clicking here.

Last week's feature article was:
Estate Planning Tip: Creditor Protection for IRAs & Beneficiaries
and is available by clicking here and was a popular discussion in 3 LinkedIn groups.

Weekly Time Saver / Helpful Hint:
Do you have to prepare IRS Form 1040 and 1041 tax returns? If you do, we are introducing a new time saving and accuracy improving tool, "The 1040/1041 Income Calculator," for calendar and fiscal years. For more information, see the ESI WAY section later in this eNewsletter.

Upcoming events ESI-APPRAISE will be participating in:
- Jan 6, 7: System maintenance from 9:00p Fri through 12:00p Sat (ET)
- Jan 9-13: 51st Annual Heckerling Institute on Estate Planning (Booth #501)
- Jan 16: Martin Luther King Jr. Holiday
- Jan 18: Greater New Jersey Estate Planning Council - "The NJ Uniform Trust Code"
- Jan 19: Estate Planning Council of New York City
- Jan 26: Bergen County Estate Planning Council - "Heckerling Review"
- Jan 30: ESI Complimentary Webinar - "Life Keeping: Supporting Your Aging Clients"
We will once again be exhibiting at the annual Heckerling Institute on Estate Planning. Please stop by our booth, #501 by the registration desk, to say hello and share anything on your mind with us.

Complimentary Webinar

We instituted a monthly complimentary webinar series to enable our subscribers to receive concise instruction on issues and ideas affecting our industry without having to leave your office.

Our January topic is: "Life Keeping: Supporting Your Aging Clients."

The webinar is scheduled for Wednesday, January 25, 11:30a - 12:00p ET. You can register by clicking here. Our speaker is Rebecca Eddy of Eddy & Schein, Inc.

You can access a recording of last month’s webinar: “Estate & Gift Tax Planning During Uncertain Times”, as well as prior webinars, by clicking on the icon below.

Monthly Survey

Our January 2017 survey asks a series of questions before we actually get to the survey question. The topic is determining "as of" holdings from brokerage statements.

1. Do you have the staffing and/or time to go through the statements?
2. Do you have the research tools and knowledge to investigate corporate actions and capital changes?

Now, here is the survey question:

Would you be interested in outsourcing this function to us if we charged a hourly professional fee for these services?

Please click here to take the survey.

The ESI Way: Simple Solutions for Complex Problems

Do you have to prepare IRS Form 1040 and 1041 tax returns?

The ESI-APPRAISE 1040-1041 Income Calculator is a powerful, time saving tool for the preparation of IRS Form 1040 and 1041 tax returns when there is a date of death involved.

The Calculator collects and then displays income, month by month, by calendar or fiscal year, for most security types.

You can create a new portfolio or import an existing ESI-APPRAISE date of death portfolio. Importing from an existing APPRAISE portfolio is a particularly valuable feature.

If you would like more information about our other quick, accurate, economical, and innovative solutions which help you serve your clients better and more profitably, please click here.

Customer Feedback & Testimonial

We want to make it easy for our clients to give us feedback. Please click here if you want to contact us.

Here is a recent testimonial from a client.
"I like your services. The report is exactly what the accountants need for filing."
- Jupiter, FL