

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

May 14, 2024

Trusts & Estates News

This week's Trust and Estate article is:
"Prepare large estates for TCJA sunset now"

(Excerpt from actual article):

CPA financial planners need to talk with high-net-worth clients now about the idea of shifting ownership of millions of dollars in assets before the estate and gift tax basic exclusion is essentially cut in half on Jan. 1, 2026, Bob Keebler, CPA/PFS, said in an AICPA Personal Financial Planning (PFP) Section webcast.

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

Last week's Trust & Estate article was:
"Forgoing marriage? Estate planning for unmarried couples"

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



Helpful Hint

This week's Helpful Hint is:
"Daily Dividends for Mutual Funds"

Many income-focused funds that invest primarily in bonds and money-market securities accrue their dividends on a daily basis despite being only paid out on a monthly or less frequent basis. Appraise clients have the option to include, or exclude, these daily dividends in their valuations.



Last week's Helpful Hint was:
"Estate & Gift Tax or EZPrice?"

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

If you want to speak with us, please:
call: 201-784-8500 x111
email: customerservice@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)

- Thu, May 23: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- Fri, May 24: (3:00p ET) Support will be closing early for the Memorial Day holiday. All online services will still be available.



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.

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Evaluation Services, Inc.

180 OLD TAPPAN ROAD,
BUILDING 4, OLD TAPPAN, NJ
07675
(201) 784 8500
appraisenj.com

Contact
Us



Evaluation Services, Inc. | 180 OLD TAPPAN ROAD, BUILDING 4, OLD TAPPAN, NJ 07675

[Unsubscribe charles_s_rossmann@appraisenj.net](mailto:charles_s_rossmann@appraisenj.net)

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