

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

February 20, 2024

Industry News

This week's Trust and Estate article is:
"Mom and dad are giving away \$84 trillion in the 'great wealth transfer.' And they have some thoughts on how to spend it"

(Excerpt from actual article):

"How the wealthiest individuals decide to give some of their wealth away is changing."

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

Last week's Trust & Estate article was:
"The IRS Is Recruiting an Army to Take on Wealthy Taxpayers"

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](#).



Helpful Hint

This week's Helpful Hint is:
"2024-Q1 Poll Results"

Earlier this month, we asked our clients this question: "**Which APPRAISE delivery option do you prefer?**"

Here are the ranked results:

1. Web: 27%
2. Software as a Service: 19%
3. API: 18%
4. Outsourcing: 16%
5. Software: 12%
6. ESI-Direct: 8%



Last week's Helpful Hint was:

"The IRS is investing in compliance.

Are you ready?"

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

If you want to speak with us, please:

call: 201-784-8500 x107

email: techsupport@appraisenj.net

Upcoming Events

(Subject to change - please monitor regularly)

- Thu, Feb 22: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- Fri, Feb 23: The office will open at (10:30a ET). All online services will still be available.



Maybe there is a better way?

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. We can speak with you to potentially identify ways to improve performance and accuracy without hiring additional people.

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Thank you for subscribing and allowing us to serve you.

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