

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
March 19, 2024

Industry News

**This week's Trust and Estate article is:
"Hot Topics for Private Clients and
Family Offices from 2024 Heckerling
Institute on Estate Planning"**

(Excerpt from actual article):

"Earlier this year several Warner attorneys attended the annual Heckerling Institute on Estate Planning, the country's most well-respected educational event for professionals working in the trusts and estates area. The programs offered in-depth coverage of important court decisions, tax law changes and other developments in wealth planning. In this first of two blog posts, we wish to share some of the conference's relevant takeaways for high net worth clients and family offices on "hot topics" related to valuation issues."

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

**Last week's Trust & Estate article was:
"Rich People Rush to Offload Wealth
Before Estate Tax Break Drops"**

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:
"Which Continuing Education
Institutes do you attend?"**

Our [Industry News](#) article in his eNewsletter discusses the annual Heckerling Institute on Estate Planning.

Do you attend the Heckerling or other continuing education institutes? Please take our poll (see below).

**Last week's Helpful Hint was:
"Two New Research Products"**

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



Helpful hints

Which Continuing Education Institutes do you attend?

Heckerling (Jan)

American Bankers Association Wealth Mngt (Feb)

National Association Estate Planning Council-NAEPC (Oct)

Other

None

Upcoming Events

(Subject to change - please monitor regularly)

- Fri, Mar 29: The NASDAQ & NYSE will be closed for the Good Friday holiday. We will be closed as well.
- Thu, Apr 18: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.



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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