

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

May 28, 2024

Trusts & Estates News

**This week's Trust and Estate article is:
"The 11 U.S. Cities With the Most
Millionaires"**

(Excerpt from actual article):

In our increasingly global society, millionaires can be found just about anywhere. However, according to a recent study by international wealth migration specialists Henley and Partners, the U.S. continues to lead the way in terms of resident millionaires (defined as those with liquid investable wealth of \$1 million or more), placing 11 cities in the top 50, including New York City, which sits firmly in first place. A staggering 349,500 millionaires, 744 centi-millionaires (with investable wealth of over \$100 million) and 60 billionaires live in the Big Apple.

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

**Last week's Trust & Estate article was:
"Key Tax Provisions That Are Expiring
After 2025"**

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



Helpful Hint

**This week's Helpful Hint is:
"Can you restore lost portfolios?"**

This is a question we received last week which has a two part answer.

1. If you have us prepare the valuations for you through our [Outsourcing department](#), or you use our [Webappraise](#) services, we can restore your portfolios.
2. If you use our [Software](#) or [Software as a service](#) products, they were intentionally designed so we do not store any of your data, so subsequently we cannot restore



lost portfolios.

**Last week's Helpful Hint was:
"Queries about our API service"**

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)

- Wed, Jun 19: We will be closed for the NASDAQ & NYSE Juneteenth holiday. All online services will be available.
- Thu, Jun 20: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.



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.



Click [HERE](#) for a list of valuations we provide and how you can get them.

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

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