

# APPRAISE

By Evaluation Services, Inc.  
*Makes it Simple!*

*Quick, Accurate, and Economical  
Historical Stock & Bond Valuations  
for Trusts and Estates*

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter  
July 23, 2024

## Trusts & Estates News

This week's Trust and Estate article is:  
"A Crucial Window For Estate  
Planning"

**(Excerpt from actual article):**

Contrary to common belief, the benefits of estate planning aren't exclusive to those with massive amounts of assets above \$20 million. A couple that doesn't seem to warrant estate planning help, who have, say, only \$10 million, could see their assets grow well beyond the future exemption thresholds when investment returns are compounded over time. Historically, assets, such as those tracked by the S&P 500, have seen an average annual return of 7.3% over the past 30 years. Such a rate of return could double an estate's value every decade. So estate planning is imperative for those who may not currently exceed the exemption but may in the future.

Sports fans have no doubt heard the famous quote often attributed to hockey legend Wayne Gretzky: "Skate to where the puck is going to be, not where it has



been.” The same philosophy applies to estate planning—don’t plan based on where the estate stands today; create a plan for where the estate will likely be in the future.

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

**Last week's Trust & Estate article was: "UBS Sees \$83T Wealth Transfer Over Next Three Decades"**

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

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## Helpful Hint

**This week's Helpful Hint is: "Estate & Gift Tax Valuations in the Cloud"**

WealthManagement.com recently published an article entitled, The Estate Tax Tech Revolution Is Picking Up Speed. Here is an excerpt from the article: “The integration of technology into estate planning has revolutionized the field, breaking down long-standing barriers.”



Have you considered the possibility of preparing estate and gift tax valuations from a website instead of software? Attend our Wednesday, July 31 webinar, "Estate & Gift Tax Valuations in the Cloud", as it may be of interest to you.

Please click [HERE](#) to learn more about this webinar.

Send us an [EMAIL](#) if you have questions.

**Last week's Helpful Hint was: "Why you should take a look at Appraise SaaS?"**

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

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## 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, Jul 25:** (5:00p EDT) 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](mailto:customerservice@appraisenj.net)

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