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"Industry News, Helpful Hint, & Upcoming Events" Newsletter
November 25, 2025

Trusts & Estates News Article:



Overhauling Older Estate Plans After the OBBBA

The passage of the One Big Beautiful Bill Act necessitates a review of estate plans. Key considerations include the main changes in estate planning, the potential ineffectiveness of older plans—especially those with credit shelter trusts—the impact on "basis step-up" and capital gains, and the actions families or advisors should take now. Additionally, it's important to be aware of the risks or uncertainties surrounding estate tax laws as these changes unfold.

Thank you, David Lenok, Senior Editor at WealthManagement, and Jamie Hopkins, Chief Wealth Officer at Bryn Mawr Trust, for the insightful discussions.

Read the entire article by clicking [here](#). The [PDF](#) copy is attached for your convenience.

Last week's Trust & Estate article was:

The Estate Tax Is Dead, This Expert Says. What Comes Next

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



This week's Helpful Hint:

What is an ISIN number?

An International Securities Identification Number (ISIN) is a 12-digit alphanumeric code that uniquely identifies a specific security. Each country's National Numbering Agency (NNA) allocates ISINs.

Unlike ticker symbols, which are used at the exchange level, ISINs are universally recognized identifiers for securities. They facilitate clearing and settlement and ensure consistent tracking of institutional investors' holdings across global markets.

Last week's Helpful Hint was:

On the November 11 US Veterans Day holiday, while the New York and NASDAQ Stock Exchanges were open, the **U.S. bond markets were closed**. [Click HERE](#) for the SIFMA holiday schedule. However, our clients were still able to receive bond prices because our data vendor, Intercontinental Exchange, provides [evaluated prices](#) for these issues.

Upcoming Events:

- Wed, Nov 26: Evaluation Services Customer Service / Technical Support will be closing early (2:00 pm ET) for the Thanksgiving Holiday. All online systems will be available.
- Thurs, Nov 27: Office is closed for the Thanksgiving holiday.
- Fri, Nov 28: The NASDAQ & NYSE exchanges are closing at 1:00pm ET. Evaluation Services Customer service / Technical Support will be closing at 1:00 pm ET as well. All online systems will be available.

Note: Avoid running the portfolio for pricing between **Saturday at 8:00 PM Eastern** and **Sunday at 8:00 AM Eastern**, as the Intercontinental Exchange (ICE), our data provider, is offline during that time.

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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 **operational efficiency**.



1. Secure online solutions (You do the work and save money.):

1. [APPRAISE.API](#): a secure interface that streamlines portfolio pricing. This is done by allowing clients to program directly from their trust system into our proprietary pricing system and customize it for their reporting needs. No personal or client data is exchanged. This can be a way to cut costs, improve efficiency, and improve your processing metrics.
2. [APPRAISE.Web](#): A web-based application, accessed through any browser, that provides stock and bond valuations for estate, gift, and trust tax. Portfolios are saved to your account and accessible wherever you are, on any device.
3. [APPRAISE.Software](#): Our proprietary software that has been serving our clients since 1985. Install it on any computer and get the estate, gift, and trust tax valuations you need quickly, accurately, and securely.
4. [APPRAISE.SaaS](#): Software as a Service (SaaS) means we host the software, which you access via the internet, and you store your data locally on your computer. This benefits you and your information technology group because a hybrid solution takes the best of software and web and combines them. You're always running the current version and do not need to install updates. Your portfolio data is stored securely on your computers. It's easy to add and remove users. The underlying technology is Citrix.
5. [ESI-Direct](#): Thomson Reuters ONESOURCE Trust & Estate securities valuations without valuation software. Everything is done from within the Accounting or 706, reducing steps, saving time, and increasing accuracy.

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