

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

January 13,
2026

Trusts & Estates News Article:

What families should be asking their Estate Planners in 2026:

In this article, Matthew F. Erskine explores the critical questions wealthy families must address with their estate planners in 2026. As the "estate tax cliff" approaches and trust laws shift, traditional strategies require urgent stress-testing against increased IRS scrutiny. Key focuses include ensuring trust flexibility for dynasty planning and protecting business assets from potential legislative changes. The landscape also faces a "new normal" of litigation risk, necessitating clearer documentation of capacity and intent. Furthermore, global assets and charitable strategies must be coordinated to balance confidentiality with expanding reporting requirements. A significant emerging challenge involves integrating AI and cybersecurity protocols into fiduciary duties to safeguard client data. Ultimately, estate plans in 2026 must be more sophisticated and adaptable than ever to preserve multi-generational wealth. This proactive approach ensures that family legacies are protected against both legal volatility and evolving technological risks.

Read the entire article by clicking [here](#). The [PDF](#) version of the article.

Helpful hint of the week:

Valuing Foreign Securities in the USA:

When clients request pricing for securities traded on non-U.S. exchanges, Appraise reports valuations in U.S. dollars.

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For any questions, please email us [@clientinfo@appraisenj.net](mailto:clientinfo@appraisenj.net)

Appraise

Helpful
hint



Last week Article:
Estate and Gift
Tax Planning for
2026 and Beyond

**Last week Helpful
hint:**
How are high/low
prices handled
when not
available for a
foreign or
domestic equity?

[Read more at](#)

Note:

Mon, Jan 19, 2026:
Martin Luther King
Day – Office
Closed, Online
Services Available.

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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Specialty & Risk Mitigation Ideal for reducing risk exposure.	4. Appraise Outsourcing 5. Appraise (Desktop) 6. Appraise SaaS *Requires IT involvement to manage third-party Citrix software	4. Expert service and quality assurance. 5. Mitigates risk by saving files locally. 6. The combined convenience of the web and the risk mitigation of software.

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