

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

March 3,
2026

Trusts & Estates News Article:

"The Emotional Side of Estate Planning"



In the article "The Emotional Side of Estate Planning," author Elise Buie emphasizes that while estate planning is often viewed as a purely legal or financial task, its most significant impact lies in how it shapes family relationships long after a person's death. The piece warns that when decisions regarding assets and roles are made in isolation, heirs are often left to interpret the reasoning themselves, which can lead to inaccurate inferences of favoritism or judgment and fuel lifelong resentment. To mitigate this risk, Buie advocates for transparency and open communication, suggesting that testators share the rationale behind their choices while they are still alive to provide clarity and resolve potential conflicts. Ultimately, the article argues that a successful estate plan must account for complex family dynamics and prioritize the preservation of emotional bonds, ensuring that one's final legacy is a source of peace rather than a catalyst for family discord.

Read the entire article by clicking [HERE](#).

Helpful hint of the week: "Transferring valuations between APPRAISE & ONESOURCE 706"



You can export ESI-APPRAISE valuations to [Thomson Reuters ONESOURCE 706 estate tax software](#). This time saving feature both reduces cost and increases accuracy by eliminating manual input.

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

For any questions, please email us @clientinfo@appraisenj.net

Last week's
Trusts & Estates
News Article:
2026 Estate and
Gift tax Update.

Last week's
Helpful Hint:
What is ESI-
Direct?

[Read more HERE](#)

Notes:

April 3: NYSE
Good Friday
Holiday. Office is
closed. Online
services available.

Avoid sending
portfolios for
pricing between
Saturday at 8:00
PM and
Sunday at 8:00 AM
Eastern Time.
Intercontinental
Exchange (ICE),
our data provider,
is offline during
that time for
maintenance.

Need a trusted partner for your trust, estate, or gift tax valuations?
Let **Evaluation Services Inc. (ESI-APPRAISE)** simplify the process for you.

☎ Call us at [201-784-8500 x111](tel:201-784-8500) or ✉ [Email us](#) today.

At Evaluation Services, our vision is **"Empowering efficiency through innovation"**,
providing flexibility and choice to each client.

Category	Solution(s)	Values
<p><u>Enterprise & Automation</u></p> <p>Ideal for large-scale operations.</p>	<p>1.Appraise API</p>	<p>1.Scalable Automation. Secure system-to-system data transfer. No manual process.</p>
<p><u>Convenience & Integration</u></p> <p>ideal for cutting infrastructure costs.</p>	<p>2.Web Appraise</p> <p>3.ESI-Direct</p> <p>*No IT overhead or manual updates.</p>	<p>2. Secure access from anywhere.</p> <p>3. Platform integration with ONESOURCE Trust and Estate Administration software.</p>
<p><u>Specialty & Risk Mitigation</u></p> <p>Ideal for reducing risk exposure.</p>	<p>4.Appraise Outsourcing</p> <p>5.Appraise (Desktop)</p> <p>6.Appraise SaaS</p> <p>*Requires IT involvement to manage third-party Citrix software</p>	<p>4.Expert service and quality assurance.</p> <p>5.Mitigates risk by saving files locally.</p> <p>6.The combined convenience of the web and the risk mitigation of software.</p>



APPRAISE
By Evaluation Services, Inc.
Since 1985

Fast, Accurate, Easy and Economical
Historical Stock & Bond Valuations for Trusts & Estates

✓ First Class Service ✓ Innovative Technology ✓ IRS Accepted

Unitrust Valuation Reports in Appraise

Ⓞ Compliance

⚙️ Tax Optimization

🎯 Precision

Take advantage of the CRUT season

● Deliver Accuracy ● Build Confidence

Email us today for details
clientinfo@appraisenj.net

Are you the correct recipient of this Newsletter?

Know someone who might benefit from the insights in this Newsletter? Feel free to share it with them! They can subscribe directly by clicking the link below

[Sign up for ESI-APPRAISE notifications and weekly Newsletters](#)

You can 'Safely Unsubscribe' by clicking on the link at the bottom of this Newsletter.

Thank you for subscribing and allowing us to serve you.

Evaluation Services, Inc.
180 OLD TAPPAN ROAD,
BUILDING 4, OLD TAPPAN, NJ 07675
(201) 784-8500
Office hours: 09:00 am - 05:15 pm

Visit our Website

LinkedIn for quick updates & helpful hints

[Our Company Contact Us](#)

Evaluation Services Inc. | 180 OLD TAPPAN ROAD BUILDING 4 | OLD TAPPAN, NJ 07675 US

[Unsubscribe](#) | [Constant Contact Data Notice](#)



Try email & social marketing for free!