

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

March 10,
2026

Trusts & Estates News Article:

"Engaging Gen Z: A New Era of Family Wealth Conversations"



As the "Great Wealth Transfer" begins to shift trillions of dollars to younger generations, Gen Z is redefining the family wealth dynamic by demanding greater **transparency, purpose, and digital integration** than their predecessors. Unlike previous generations who often kept financial details private, Gen Z views wealth as a tool for freedom and social impact, frequently pushing for **values-aligned investing** and early involvement in decision-making. To bridge the gap, financial advisors are encouraged to move away from jargon-heavy, top-down models in favor of **collaborative partnerships** that utilize bite-sized digital content and address the emotional complexities of inheritance. Ultimately, successfully engaging this "digital-native" cohort requires building trust through authenticity and recognizing that for Gen Z, financial success is inextricably linked to personal values and long-term stewardship.

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

Helpful hint of the week: "Pricing data vendor system Maintenance"

Our pricing data vendor, **Intercontinental Exchange Inc.** (ICE) has set aside 8p Sat - 8a Sun (ET) for system maintenance. If you send a portfolio for pricing during this time you will not get any data back.

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



Last week's
Trusts & Estates
News Article:
The Emotional
Side of estate
Planning.

Last week's
Helpful Hint:
Transferring
valuations between
APPRAISE &
ONESOURCE 706

[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.

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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>



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