

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

March 17,
2026

Trusts & Estates news
article of the week:
**"Navigating the Great
Wealth Transfer Across
Multiple Generations"**



In the article "Navigating the Great Wealth Transfer Across Multiple Generations," author Assunta McLane explores the strategic and human dimensions of managing the projected \$84 trillion transition of assets to future heirs. McLane emphasizes that successful stewardship requires more than technical proficiency; it necessitates robust family governance, intentional heir education, and the use of flexible planning vehicles like dynasty trusts, SLATs, and strategic Roth conversions. By integrating charitable planning and fostering open communication, McLane argues that advisors can help families align their financial structures with long-term values, ensuring that wealth serves as a lasting tool for empowerment and family cohesion rather than a source of conflict.

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

**Last week's
Trusts & Estates
news article:**
"Engaging Gen Z:
A New Era of
Family Wealth
Conversations"

**Last week's
Helpful Hint:**
"Pricing data
vendor system
maintenance"

[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.

Helpful hint of the week:
**"How to Enter Preferred Stock Tickers in
Appraise for Valuation"**



If the preferred stock ticker contains "PR",
replace "PR" with a period (.) to match Appraise's preferred issue
ticker format.

Example:

- Company: Allstate
- Standard Ticker: ALL
- Preferred Stock Ticker: ALLPRJ
- Appraise-Compatible Ticker: ALL.J

✓ Correct Entry for Appraise: ALL.J

This formatting ensures Appraise recognizes and values the
preferred stock correctly.

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

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