

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

March 24,
2026

Trusts & Estates news article of the week:
"Why the Boomer Wealth Transfer Might Not Be So 'Great'"



In the article "Why the Boomer Wealth Transfer Might Not Be So Great," author Jane Wollman Rusoff challenges the optimistic narrative surrounding the "Great Wealth Transfer" by highlighting several factors that could significantly diminish the expected inheritance for younger generations. Rusoff explains that while trillions are projected to change hands, much of this capital may be depleted by the rising costs of long-term healthcare, increased longevity requiring retirees to spend more of their savings, and the potential for market volatility or poor investment choices. Furthermore, the author notes that wealth is highly concentrated among the wealthiest households, meaning the average heir may receive far less than headlines suggest, while complex family dynamics and lack of proper estate planning further complicate the seamless transition of assets.

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

Helpful hint of the week:
"IRS Form 709 Gift Tax Valuations"

Providing gift tax valuations, in full compliance with the [stringent IRS Form 709 regulations](#), is part of our suite of valuation services. Please contact us for more information about these valuations and how you can get them from us.

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



Last week's Trusts & Estates news article:
"Navigating the Great Wealth Transfer Across Multiple Generations"

Last week's Helpful Hint:
"How to Enter Preferred Stock Tickers in Appraise for Valuation"

[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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