

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

March 31,  
2026

Trusts & Estates news article of the week:  
**"Tax, Estate Planning Season Appears Less Fraught; Uncertainties Linger"**



In the article "Tax, Estate Planning Season Appears Less Fraught; Uncertainties Linger," author Tom Burroughes (Group Editor) examines how the 2026 US tax season has become more predictable following the passage of the "One Big Beautiful Bill Act" (OBBBA), yet still presents complexities for high-net-worth families. Brian Schultz, CPA and leader of the Plante Moran Wealth Management tax team, explains that while the OBBBA introduced beneficial retroactive deductions and increased the SALT deduction cap to \$40,000, its various income phaseouts create a risk of unintended tax consequences that complicate financial decisions. Brittany Cook, co-head of AITi Tiedemann Global's wealth planning team, notes that this legislative stability has allowed clients to move beyond reactive policy-watching to focus more on the deeper purpose of their wealth and legacy. Anthony Belloli, CEO of Plante Moran Trust, warns against the common error of inaction due to indecision, advising that an "imperfect" emergency plan is far superior to no plan at all. Finally, Kathleen Grace, CEO and founder of Fiduciary Family Office, highlights a growing trend where families are prioritizing well-organized entity structures and long-term values over short-term tax fluctuations, viewing the tax season as a vital opportunity to coordinate their increasingly complex financial lives.

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

Helpful hint of the week:  
**"CUSIPs starting with "9EQ" will not be recognized nor priced"**



Generally, the CUSIP prefix (9EQ) is used to assign a CUSIP number to "non-public" or "internal" assets. While the asset may be valid, those identifiers will not be recognized or valued by our data vendor because they do not have a formal public listing associated with them. Use the associated SEDOLs that you get for them instead.

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

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

**Last week's Helpful Hint:**  
"IRS Form 709 Gift Tax Valuations"

[Read more HERE](#)

**Notes:**  
**Fri, Apr 3:**  
NASDAQ / NYSE Good Friday Holiday. Our office is closed. Online services are 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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