

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

April 14,  
2026

Trusts & Estates news article of the week:  
**"Estate Administration in the Age of Data Persistence"**



In the article "Estate Administration in the Age of Data Persistence," author **Daniel Cohen**, a founding partner at Consumer Attorneys, explores the modern challenges executors and fiduciaries face when a decedent's financial data outlives them. Cohen highlights how automated credit reporting and debt collection systems often continue to update files after death, leading to "data persistence" issues like false deceased notations or, conversely, identity theft where a decedent appears "active" on paper. These errors can paralyze the estate administration process, forcing fiduciaries to resolve fraudulent claims or verify incorrect liabilities before assets can be distributed to heirs.

Cohen emphasizes that while the Fair Credit Reporting Act (FCRA) was primarily designed for the living, it remains a critical tool for estate representatives to correct these inaccuracies. He explains that fiduciaries must proactively use dispute rights and identity theft blocking provisions to protect the estate's integrity. By securing the decedent's credit profile and demanding accuracy from reporting agencies, wealth advisors and executors can prevent legitimate assets from being drained by automated errors or exploitative fraud in the digital age.

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

Helpful hint of the week:  
**"ESI-APPRAISE's 2026 First Quarter Review"**



Since our clients are always at the center of everything we do, we send an email reviewing our accomplishments for them from the past quarter. You can read it by clicking [HERE](#).

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

**Last week's Trusts & Estates news article:**  
"The Battle Over Zappos CEO's \$500M Estate"

**Last week's Helpful Hint:**  
"Export to comma delimited file"

[Read more HERE](#)

**Notes:**  
**Mon, May 25** is the NASDAQ / NYSE Memorial Day holiday. The exchanges, and our office, will be closed. Online services are always available except during scheduled maintenance (see below).

**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.

Our vision is "**Transforming Trust & Estate Valuations Through Innovation**", providing flexibility and choice to each client. That's why we offer six distinct ways to obtain IRS-compliant valuations, ensuring the perfect fit for your firm's size, technical

capabilities, and risk profile. No other provider offers this level of versatility.

We invite you to explore our solutions, and discover how ESI can help you streamline your processes while maintaining accuracy and compliance.

Category	Solution(s)	Values
<p><b><u>Enterprise &amp; Automation</u></b></p> <p>Ideal for large-scale operations.</p>	<p><b>1.Appraise API</b></p>	<p>1.Scalable Automation. Secure system-to-system data transfer. No manual process.</p>
<p><b><u>Convenience &amp; Integration</u></b></p> <p>ideal for cutting infrastructure costs.</p>	<p><b>2.Web Appraise</b></p> <p><b>3.ESI-Direct</b></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><b><u>Specialty &amp; Risk Mitigation</u></b></p> <p>Ideal for reducing risk exposure.</p>	<p><b>4.Appraise Outsourcing</b></p> <p><b>5.Appraise (Desktop)</b></p> <p><b>6.Appraise SaaS</b></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>

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 - 05:00 pm Eastern Time  
 We follow the NYSE & NASDAQ holiday schedule

**Evaluation Services, Inc. - Historical Stock and Bond Valuations for Trusts and Estates**

Visit our Website

LinkedIn for quick updates & helpful hints

YouTube for product demos

[Our Company Contact Us](#)



Try email & social marketing for free!