

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

April 21,
2026

Trusts & Estates news article of the week:
"Transmitting Family Values Along With Assets"



In the article "Transmitting Family Values Along With Assets," author John Knowlton, co-founder of Credent Wealth Management, argues that preserving multi-generational wealth requires more than just financial planning; it necessitates the intentional transmission of core values from one generation to the next. Highlighting the rapid dissipation of the Vanderbilt family fortune as a cautionary tale, Knowlton explains that parents must instill a service-oriented mindset in their children to prevent the "shirtsleeves to shirtsleeves" phenomenon. He suggests that advisors should encourage clients to have regular, meaningful conversations with their families—whether during car rides, at the dinner table, or during major celebrations—to share stories about how their work solves problems and meets the needs of others. By focusing on the "drip by drip" process of teaching stewardship and the value of helping people rather than maximizing consumption, families can better ensure that their heirs have the character and discipline required to maintain and grow their inheritance..

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

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

Last week's Helpful Hint:
"ESI-APPRAISE's 2026 First Quarter Review"

[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.

Helpful hint of the week:
"Current version of the Appraise desktop software is 8.1.2"



Now that tax season is over, we want to remind our desktop software clients that the current version is 8.1.2. If you are on a prior version, you may want to consider upgrading.

1. Read about all the new features in the release notes [HERE](#).
2. Read the technical requirements [HERE](#).
3. Download APPRAISE v8.1.2 [HERE](#).

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

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