

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

May 5, 2026

Trusts & Estates news article of the week:
"Four Tips to Win—and Keep—High-Net-Worth Clients"



In the article "Four Tips to Win—and Keep—High-Net-Worth Clients," author Michael Featherman argues that the key to retaining affluent investors lies in the quality and depth of the advisor relationship rather than just investment performance or fee structures. Featherman suggests that advisors must first reclaim time by streamlining routine tasks, allowing them to shift from a reactive to a proactive leadership role that high-net-worth clients expect. He outlines four essential disciplines for success: prioritizing relationship-building, integrating tax management as a core value-add, leveraging AI-powered insights to achieve "personalization at scale," and maintaining consistency in communication to become an indispensable partner. Ultimately, Featherman emphasizes that advisors differentiate themselves by demonstrating a comprehensive understanding of a client's complex financial life and anticipating their needs before they are prompted.

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

Helpful hint of the week:
"The ESI-APPRAISE Help Center"

Did you know we have a [Help Center](#) available for our clients on our website? You can search for frequently asked questions, tutorials, and other helpful information.

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

Appraise
Helpful
hint 

Last week's Trusts & Estates news article:
"Estate Planning Lessons from Tony Hsieh's Contested \$500M Will"

Last week's Helpful Hint:
"How to enter a warrant ticker symbol into Appraise for pricing"

[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.

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

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