

"Industry News & Helpful Hint" Newsletter

May 26,
2026

Trusts & Estates news
article of the week:
**"What to do When UHNW
Clients Go Quiet"**



Summary: In the article "Three Key Themes Shaping UHNW Family Office Strategy" (alternatively titled "What to Do When UHNW Clients Go Quiet"), authors Aaron Bates (Head of Ultra-High Net Worth and Growth Strategies) and Rick Meyers (Executive Managing Director, Head of Client & Advisory) of Bernstein Private Wealth Management outline the primary concerns facing ultra-high-net-worth (UHNW) families. Driven by a surge in newly wealthy households and a shifting social landscape, these families increasingly rely on family offices to handle growing relational, organizational, and operational complexities. Based on insights gathered from a semiannual UHNW summit, the authors identify three central pillars that wealth advisors must address to manage risk and support their clients effectively: preparing the next generation for wealth stewardship, building organizational resilience amid economic and geopolitical volatility, and navigating the emotional identity crises that occur during major life or business transitions.

To emphasize the staggering scale of the impending generational wealth transfer, the authors cite research from Cerulli, which estimates that \$124 trillion will be transferred in the U.S. through 2048, with \$62 trillion originating from HNW and UHNW households. They also reference a Capgemini study highlighting that 526,000 new millionaires emerged in 2024 alone alongside a 6.2% rise in UHNW individuals, accentuating the urgent need for robust family governance structures. Ultimately, Bates and Meyers argue that proactively addressing these "soft issues"—such as the isolation and family friction that can stall crucial decision-making—is not a matter of therapy, but a strategic form of risk management that ensures family unity and long-term asset protection..

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

**Last week's
Trusts & Estates
news article:**
"Multigenerational
Households:
Avoiding
Succession
Frictions With
Trusts"

**Last week's
Helpful Hint:**
"Financial Identifier
Translator"

[Read more HERE](#)

Notes:
Fri, Jun 19 is the Juneteenth holiday and the financial markets will be closed. Our office will be closed as well. We will be performing system maintenance and pricing services will be intermittently unavailable.

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:
"Estate & Gift Tax or EZPrice Valuation?"

Our software and software-as-a-service clients can choose between an Estate & Gift Tax valuation and an EZPrice valuation. What is the difference? Estate & Gift Tax valuations satisfy the stringent IRS Forms 706 and 709 requirements. EZPrice is intended for portfolio valuations and does not comply with IRS regulations.

Appraise

Helpful
hint 

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<u>Specialty & Risk Mitigation</u> Ideal for reducing risk exposure.	4. Appraise Outsourcing 5. Appraise (Desktop) 6. Appraise SaaS *Requires IT involvement to manage third-party Citrix software	4. Expert service and quality assurance. 5. Mitigates risk by saving files locally. 6. The combined convenience of the web and the risk mitigation of software.

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