

"Industry News & Helpful Hint" Newsletter

June 2,
2026

Trusts & Estates news
article of the week:
**"529 College Saving Plans
Are More Powerful Estate,
Tax Planning Tools."**

Trusts & Estates

Summary: In the Forbes article "529 College Saving Plans Are More Powerful Estate, Tax Planning Tools," author Bob Carlson explains that continuous legislative expansions have evolved 529 plans from basic college savings vehicles into highly flexible, multi-generational wealth-transfer mechanisms. He highlights that because contributions are treated as completed gifts for federal tax purposes, individuals and married couples can take advantage of unique front-loading rules to accelerate up to five years of annual gift-tax exclusions at once—allowing significant assets to compound tax-deferred and be removed from a taxable estate. Furthermore, Carlson emphasizes that these plans now cover a much broader scope of educational costs, including K-12 tuition, vocational programs, and student loan repayments, though he cautions that families must carefully navigate varying state-level tax conformities and financial aid formulas to maximize the estate benefits.

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

Helpful hint of the week:
**"We are unable to value privately held
corporations."**

We were asked this week whether we could value ABERDEEN INTERNATIONAL PARTNERS LP, and COTTON CREEK CAPITAL PARTNERS LTD. Though we can provide pricing for millions of publicly traded securities, we are unable to provide pricing for these non-publicly traded companies.

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



**Last week's
Trusts & Estates
news article:**
"What to do When
UHNW Clients Go
Quiet"

**Last week's
Helpful Hint:**
"Estate & Gift Tax
or EZPrice
Valuation?"

[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.

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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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