

"Industry News & Helpful Hint" Newsletter

June 9,
2026

Trusts & Estates news
article of the week:
**"Estate Planning Still
Remains Overlooked By
Many"**



Extract: Estate planning remains one of the most overlooked areas of personal finance — not because families lack awareness, but because too many people still believe it can wait. Clients often assume estate planning is only relevant for ultra-high-net-worth households, retirees, or families facing health concerns. In practice, the absence of a basic estate plan creates some of the most expensive, emotional, and avoidable financial problems advisors encounter.

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

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

**Last week's
Helpful Hint:**
"We are unable to
value privately held
corporations."

[Read more HERE](#)

Helpful hint of the week:
"Activation Pin"



When installing the Appraise software on a workstation for the first time and occasionally when upgrading, you may be prompted for an Activation PIN. For example:

Client ID Activation Date Activation PIN
XXXX Jun 9, 2026 46384

This PIN is valid for today's date. If activation cannot be completed today, a new PIN can be generated for a more convenient date.

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

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.

Coming Soon:
"A New Version Of WebAppraise"



If you are looking for a web application for your estate, gift, and trust tax valuations, [WebAppraise](#) is worth a look. Although the product has been available for some time, we will release an updated version in July 2026. This iteration will include:

1. The ability to save portfolios in the "cloud" or locally.
2. The ability to add sales and other transactions to alternate valuations.
3. The ability to import assets to be valued from a CSV (comma-delimited) file.
4. The ability to export the valuation results to a CSV (comma-delimited) file.

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

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** 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
<u>Enterprise & Automation</u> Ideal for large-scale operations.	1. Appraise API	1. Scalable Automation. Secure system-to-system data transfer. No manual process.
<u>Convenience & Integration</u> ideal for cutting infrastructure costs.	2. Web Appraise 3. ESI-Direct *No IT overhead or manual updates.	2. Secure access from anywhere. 3. Platform integration with ONESOURCE Trust and Estate Administration software.
<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.

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

Visit our Website

LinkedIn for quick updates & helpful hints

YouTube for product demos

Evaluation Services Inc. | 180 OLD TAPPAN ROAD BUILDING 4 | OLD TAPPAN, NJ 07675 US

[Unsubscribe](#) | [Constant Contact Data Notice](#)



Try email & social marketing for free!