APPRAISE
By Evaluation Services, Inc.
Since 1985

Fast, Accurate, Easy and Economical
Historical Stock & Bond Valuations for Trusts & Estates
✓ First Class Service ✓ Innovative Technology ✓ IRS Accepted

"Industry News & Helpful Hint" Newsletter

June 23, 2026

Trusts & Estates news article of the week:
"Is The Great Wealth Transfer A Mirage?"

Summary: The article, authored by Evan Cooper, examines the prevailing financial industry narrative surrounding the "Great Wealth Transfer"—the massive, anticipated handover of assets from Baby Boomers to their heirs. Cooper challenges the assumption that this will be a straightforward, massive migration of wealth. He argues that the projected figures are often based on overly simplistic models that fail to account for the reality of modern retirement, where Boomers are living longer, spending more on healthcare and long-term care, and increasingly consuming their own capital rather than preserving it for an inheritance.

Cooper emphasizes that for many wealth managers, the expectation of a "guaranteed" windfall from the next generation is a dangerous strategic gamble. Instead of waiting for a wealth transfer that may be significantly smaller or more fragmented than predicted, he suggests that firms should focus on the complexities of intergenerational planning today. By understanding the actual spending patterns of their aging clients and building meaningful relationships with heirs early on, advisors can better navigate the realities of longevity and avoid basing their business models on a demographic myth..

Read the entire article by clicking **HERE**.

Appraise
Helpful hint

Helpful hint of the week:
"Valuing foreign securities in $US"

Sometimes, our clients ask us to price securities traded on non-US exchanges. In these situations, the values reported on APPRAISE valuations are in $US. We convert from the foreign currency.

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

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**

Last week's Trusts & Estates news article:
"After OBBBA, Some Wealthy Clients Have Estate Planning Regrets"

Last week's Helpful Hint:
"CUSIP numbers Reserved for Internal Use"

Read more HERE

Notes:
Fri, Jul 3 is the day the financial markets are celebrating the Fourth of July holiday and they will be closed. Our office will be closed as well but all online services will still be available.

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.

July 2026. This iteration will enhance some existing features and include a few additional ones. Some of these include:

1. The ability to save portfolios in our data center or on your premises.
2. The ability to add sales and other transactions to alternate date of death valuations.
3. The ability to import assets to be valued from a CSV (comma-delimited) or Excel file.
4. The ability to export the valuation results to a CSV (comma-delimited), Excel, or PDF file.
5. The ability to process bigger portfolios.
6. Multi-factor authorization and Single Sign On

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

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
Enterprise & Automation Ideal for large-scale operations.	1.**Appraise API**	1.Scalable Automation. Secure system-to-system data transfer. No manual process.
Convenience & Integration 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.
Specialty & Risk Mitigation 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

Evaluation Services, Inc. - Historical Stock and Bond Valuations for Trusts and Estates

Visit our Website

LinkedIn for quick updates & helpful hints

YouTube for product demos

Our Company Contact Us