

"Industry News & Helpful Hint" Newsletter

July 7,
2026

Trusts & Estates news
article of the week:
**"Estate Planning for Later-
in-Life Marriages"**

Trusts & Estates

Extract: While ultrawealthy seniors have long had teams of advisors to protect them, the folks I call "quietly wealthy" are often vulnerable. They're the strong-willed, successful business owners who are worth, say, \$10 to \$15 million. They've never doubted their decision-making ability and are convinced the new love of their life wants to marry them for all the right reasons. Because these owners don't usually have a team of sophisticated advisors to counsel them to sign a prenup, they're riding the nuptial bus on their own. Many believe they're well-protected if they have a revocable trust in place.

They're not.

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

**Last week's
Trusts & Estates
news article:**

"Case Study:
Estate Planning
When an Heir
Faces Mental
Health Struggles"

**Last week's
Helpful Hint:**
"Month-end
invoices by email"

[Read more HERE](#)

Notes:

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.

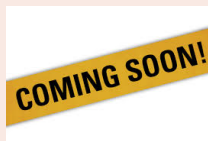
Helpful hint of the week:
**"Have you looked at the NEWS section of
our website?"**



In addition to this weekly Newsletter, we have a [News section on our website](#) that you should check regularly. The two complement one another. Going forward, we will use this section to announce holidays and new product releases, among other things.

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

Coming Soon:
"WebAppraise v2.1 coming Aug 1"



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, 2.1, on August 1 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 proprietary 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

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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.

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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

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Office hours: 09:00 am - 05:00 pm Eastern Time

We follow the NYSE & NASDAQ holiday
schedule

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