

"Industry News & Helpful Hint" Newsletter

July 21,
2026

Trusts & Estates news article of the week:
"How Stars Like Taylor Swift and Travis Kelce Protect Their Assets"

Trusts & Estates

Extract: It's a love story, baby, just say yes to the prenup.

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

Helpful hint of the week:
"What does 'we are unable to price this issue' mean on a valuation?"



This could mean one of a few different things. It could be...

1. The asset was recognized by our data vendor, Intercontinental Exchange (ICE), but had no value or pricing information available on the valuation date.
2. The asset was not recognized by our data vendor and may not be publicly traded.
3. The asset is an Intercontinental Exchange asset, which cannot be valued by our data vendor for legal reasons.

Here is a link to an FAQ on our Help Center that provides a little more information:

<https://www.newappraiseesi.com/help/faqs#32>

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

Coming Soon:
"WebAppraise v2.1 coming Aug 3"

COMING SOON!

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 3 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.

Last week's Trusts & Estates news article:

"The sandwich generation is forcing advisors to rethink the 60/40 portfolio"

Last week's Helpful Hint:
"Correctly valuing mutual funds for estate tax when the valuation date falls on a weekend"

[Read more HERE](#)

Notes:

Mon, Aug 3: We will be doing system maintenance from 9:00 a.m. to 11:00 a.m. EDT and there may be service interruptions.

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.

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

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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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