

"Industry News & Helpful Hint" Newsletter

August 4,
2026

Trusts & Estates news
article of the week:
**"An Estate Planning
Checklist For The Rest Of
2026"**

Trusts & Estates

Extract: Uncertainty and turmoil surrounded many aspects of estate planning for years, causing many people to put their planning on hold. There is no reason to delay action now. We are in a period of relative stability.

Whatever the state of your plan, it is easier to create or update it using this checklist of the essential steps for every plan.

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

**Last week's
Trusts & Estates
news article:**
"New Student
Loan Caps Turn
College Funding
Into Estate
Planning Decision"

**Last week's
Helpful Hint:**
"ESI-Appraise's
2026 Second
Quarter Review"

[Read more HERE](#)

Helpful hint of the week:
"WebAppraise v2.1.0 upgrade completed"

Appraise
Helpful
hint 

We are pleased to inform you that the WebAppraise v2.1.0 upgrade has been successfully applied.

The upgrade includes some new features, which you can read about by clicking [HERE](#).

You can read the current user manual by clicking [HERE](#).

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

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.

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