

"Industry News & Helpful Hint" Newsletter

August 11,
2026

Trusts & Estates news
article of the week:
**"Eligible taxpayers may
receive automatic penalty
relief"**

Trusts & Estates

Extract: Taxpayers with a history of filing and paying on time may now have an easier path to receive penalty relief.

This summer, the IRS's new Automatic Exemption from Penalty, or AEP, will replace the long-standing First Time Abate administrative relief. AEP is designed to eliminate the need to contact the IRS to request relief and reduce burden for those with a timely compliance history.

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

**Last week's
Trusts & Estates
news article:**
"An Estate
Planning Checklist
For The Rest Of
2026"

**Last week's
Helpful Hint:**
"WebAppraise
v2.1.0 upgrade
completed"

[Read more HERE](#)

Helpful hint of the week:
"Name changes map historically"

Appraise
Helpful
hint 

We received this question last week:
"We are looking for the mean price for American Home Products on 5/4/2001. At the time, the ticker was AHP. However, since then, AHP changed its name to Wyeth in 2002 and was purchased by Pfizer in 2009. Today, when I entered the AHP ticker, it came up as an Allied Hotel Property. How would we go about confirming the date value for American Home Products as of 5/4/2001?"

Here is the answer we provided:
"Because of the name change to Wyeth in 2002, the AHP ticker was reassigned, and the underlying CUSIP was reassigned to WYE (Wyeth's ticker). This all took place before Pfizer's 2009 acquisition. I don't believe you would use PFE.

I believe you would use WYE for Wyeth. Name changes map historically. Even though AHP didn't change its name to Wyeth until 2002 and the valuation is in 2001, the AHP data is the Wyeth data. All AHP data were relabeled for WYE."

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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Notes:

This is why you should consider WebAppraise for your estate valuations:

We've been helping financial institutions modernize the way they manage estate settlement operations. While many organizations continue to rely on traditional desktop software, we've developed a web-based platform that gives firms the flexibility to deploy either in

our proprietary data center or within their own infrastructure, depending on their security and governance requirements.

For estate settlement teams, this translates into easier access for authorized users, reduced dependence on desktop software and IT resources, streamlined updates, and a consistent experience across offices. At the same time, institutions retain the deployment model that best aligns with their technology and risk management standards.

We'd welcome the opportunity to learn more about how your company currently manages estate valuation workflows and share how other institutions are using our platform to improve efficiency while maintaining strong controls and oversight.

If it appears there may be a fit, would you be available for a conversation sometime in the next few weeks?

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<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.

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