

"Industry News & Helpful Hint" Newsletter

September
15, 2026

Trusts & Estates news article of the week:
"Estate portability elections of unused estate and gift tax exemption must be meticulously prepared"



Extract: When making a portability election, strict compliance with all the requirements is important. This item outlines the applicable rules, highlights a recent Tax Court decision, and provides key takeaways for practitioners. It concerns estate and gift tax only as it applies to U.S. citizens or residents.

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

Last week's Trusts & Estates news article:
"How Adult Children Affect Gray Marriage Estate Planning"

Last week's Helpful Hint:
"Updated Help Center Resource: IRS Regulations & Regulatory Cross-References"

[Read more HERE](#)

Helpful hint of the week:
"Pricing options (calls & puts)"



If you are pricing options (calls & puts) and don't have the required identifier, our Options Lookup product may be the answer you are looking for.

If you have 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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- Full alignment with internal risk management and security standards

We'd welcome the opportunity to learn how your team currently manages estate valuation workflows and to share how other

institutions use WebAppraise to improve efficiency while maintaining strict controls.

If there appears to be a fit, would you be open to a brief conversation sometime in the next few weeks?

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

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<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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