

"Industry News & Helpful Hint" Newsletter

September
29, 2026

Trusts & Estates news
article of the week:
**"The Great Wealth Transfer
Is Arriving – Just Not The
Way Anyone Planned"**

Trusts & Estates

Extract: For a decade, estate planners have organized their world around a single number: roughly \$100 trillion that the Baby Boomers were supposed to hand down (1). In September 2026, the more useful insight is that almost every assumption underneath that number is now in motion. Tax enforcement, transparency, mobility, asset composition, and family structure are all shifting at once. Here is what ultra-high net worth families and their advisors should be watching.

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

**Last week's
Trusts & Estates
news article:**
"The Estate
Planning
Documents Clients
Need At Every Life
Stage"

**Last week's
Helpful Hint:**
"Is there a benefit
to moving from
software to the
Web platform?"

[Read more HERE](#)

Helpful hint of the week:
**"How Does The Cost Basis Calculator
Work?"**

Appraise

Helpful
hint 

We received this question last week:

"Hello Evaluation Services, we are about to request a valuation and don't know what your \$180 cost basis calculator includes. If we provide the number of shares at date of death, will the cost basis calculator give us the cost basis assuming dividend reinvestment through today, broken down by each reinvestment?"

Here is our answer to the client's question:

"If you provide the starting number of shares held at the date of death (along with the security identifier and the date of death), the report will fully account for dividend reinvestment and corporate actions from that date through today or through the date of submission (today)."

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.

**Move Beyond Desktop
Software: Flexible
Deployment for Estate & Trust
Valuations**

We help financial institutions modernize estate valuation operations. While many organizations still rely on traditional desktop software, WebAppraise is a [web-based](#) application hosted in our secure private data center that gives you



full control over your data—letting you store portfolio files in our private cloud or in your own on-premises infrastructure.

For estate settlement teams, this delivers:

- **Flexible Portfolio Storage:** Keep portfolio data in our secure cloud or on-premises in your data center
- **Browser-Based Access:** Convenient, secure access across all offices without desktop software installs
- **Lower IT Overhead:** Centralized software management with automatic updates
- **Total Compliance:** Full alignment with your internal risk and governance standards

We'd welcome the opportunity to learn how your team currently manages estate valuation workflows and share how other institutions leverage WebAppraise to improve efficiency while maintaining strict controls. If there appears to be a fit, would you be open to a brief conversation in the coming weeks?

To schedule a conversation, please email us at clientinfo@appraisenj.net

Need a trusted partner for your estate, gift, or trust tax valuations?

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Our vision is "**Transforming Estate & Trust Valuations Through Innovation**", providing flexibility and choice to each client. That's why we offer six distinct ways to obtain IRS-compliant valuations, ensuring the perfect fit for your firm's size, technical capabilities, and risk profile. No other provider offers this level of versatility.

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

We follow the NYSE & NASDAQ holiday
schedule

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