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Transforming Estate, Gift, & Trust Valuations Through Innovation

"Industry News & Helpful Hint" Newsletter

October 20, 2026

Trusts & Estates news article of the week:
"The Next Generation of Affluent Americans Are Reshaping Giving"



Extract: Philanthropy among America's wealthy remains robust, but the landscape of charitable giving is undergoing a profound transformation. A recent Bank of America Private Bank survey reveals that the next generation of wealthy Americans remains committed to charitable giving, albeit with a different approach. For starters, Gen Z and millennial donors tend to support more causes on average than wealthy donors. They also use a broader range of charitable tools than previous generations.

Read the entire article by clicking **HERE**.

Helpful hint of the week:
"Bond prices on the Columbus Day holiday?"

Appraise Helpful hint

This is an actual question-and-answer exchange from last week.

Hi Team,
We requested a couple of bond prices for October 12th. We did get a response back from you, though the bond market was closed on Oct 12 due to Columbus Day, so we're curious how the bonds were priced as of Oct 12?

Hello!
While the US bond market was closed, our data vendor, Intercontinental Exchange, used a snapshot of prices from 4:00 PM on the prior day when the market was open. They then adjusted these values to create a model-derived price estimate for Columbus Day. Here is a link to the advisory we received: **Holiday Advisory - Columbus Day**

If you have questions, please email us at **clientinfo@appraisenj.net**

Last week's Trusts & Estates news article:
"Dolly Parton estate drama shows limits of even careful planning"

Last week's Helpful Hint:
"Why we are unable to value annuities"

Read more HERE

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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