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Fast, Accurate, Easy and Economical
Historical Stock & Bond Valuations for Trusts & Estates
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"Industry News & Helpful Hint" Newsletter

November 10, 2026

Trusts & Estates news article of the Week:

"The Unseen Defects That Topple Estate Plans"



Extract from the article: The leading defects in estate plans are often invisible to the owners, even after careful reviews of documents and details. Many people believe they have solid plans that will enhance their legacies. Later, their loved ones must deal with the consequences of the unnoticed faults. A careful review to catch these oversights can save time, money, and stress.

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

Helpful Hint of the Week:

"ESI-Appraise 2026 Third Quarter Review"



We recently completed our quarterly account review for our clients, which explains how we innovated for them last quarter, and we emailed a summary. You can read that email by clicking **HERE**.

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

Upcoming Events:



- **Wed, Nov 25:** Evaluation Services Customer Service / Technical Support will be closing at 2:00 p.m. Eastern Time for the Thanksgiving Holiday. All online systems will be available.
- **Thu, Nov 26:** Office is closed for the Thanksgiving holiday.
- **Fri, Nov 27:** The NASDAQ & NYSE exchanges are closing at 1:00 p.m. Eastern Time. Evaluation Services Customer Service / Technical Support will also close at 1:00 p.m. Eastern Time. All online systems will be available.
- **Mon, Jan 11 - Fri, Jan 15:** We will be exhibiting at the 61st Annual Heckerling Institute on Estate Planning in Orlando. You can find us at booth #501, a corner booth across from the registration area.

Last week's Trusts & Estates news article:
"Nobody prepared them': The ultrawealthy worry wealth will dull their heirs' 'drive and desire' and so some aren't telling them how much there is"

Last week's Helpful Hint:
"Web Appraise v2.1.0 New Feature Summary"

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.

Need a trusted partner for your estate, gift, or trust tax valuations?
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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
Enterprise & Automation Ideal for large-scale operations.	1.Appraise API	1. **Scalable Automation:** Secure system-to-system data transfer with zero manual processes.
Convenience & Integration Ideal for cutting infrastructure costs.	2.Web Appraise 3.ESI-Direct	2. **Data Control Flexibility:** Choose to store trust and estate portfolios in our secure private cloud or directly within your firm's own infrastructure (on-premises). Eliminates IT overhead and manages risk. 3. **Native Software Integration**: Direct, seamless integration with ONESOURCE Trust and Estate Administration software. No manual file exports/imports needed.
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We follow the NYSE & NASDAQ holiday schedule

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