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"Industry News & Helpful Hint" Newsletter

November 17, 2026

Trusts & Estates news article of the Week:

"Who Actually Pays the Estate Tax? The Eight-Figure Line Almost No One Crosses"



Extract from the article: On November 5, 2026, the IRS published its tax year 2027 inflation adjustments. The federal estate tax line rose with them: estates of people who die during 2027 get a basic exclusion of $15,480,000, up from $15,000,000 for deaths in 2026. The line moved again, so it helps to see who actually crosses it, and IRS filing data shows that the dollars come mostly from estates far above eight figures.

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

Helpful Hint of the Week:

"Bond prices on the Veterans Day holiday?"

Appraise Helpful hint

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 Veterans Day. Here is a link to the advisory we received: **Holiday Advisory - Veterans Day**

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:
"The Unseen Defects That Topple Estate Plans"

Last week's Helpful Hint:
"ESI-Appraise 2026 Third Quarter Review"

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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Office hours: 09:00 am - 05:00 pm Eastern Time
We follow the NYSE & NASDAQ holiday schedule

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