

"Industry News & Helpful Hint" Newsletter

June 30,
2026

Trusts & Estates news article of the week:
"Case Study: Estate Planning When an Heir Faces Mental Health Struggles"



Summary: The article is written by Dinah Wisenberg Brin and published as part of ThinkAdvisor's PRO content.

- The Core Premise: The article examines the intersection of technical wealth management and deep emotional reality. When a client has an heir struggling with mental health challenges, typical inheritance structures (like a direct lump-sum payout) can be risky or actively counterproductive.
- The Advisor's Role: Brin highlights that in these deeply sensitive scenarios, a financial advisor's emotional intelligence and "chairside manner" become just as crucial—if not more so—than their strict financial or tax knowledge.
- The Strategic Focus: While the technical solutions usually involve protective vehicles like special needs trusts, discretionary trusts, or appointing independent corporate trustees, the case study focuses heavily on *how* advisors can empathetically guide vulnerable, anxious parents through these difficult design decisions without triggering family friction or despair.

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

Last week's Trusts & Estates news article:
"Is The Great Wealth Transfer A Mirage?"

Last week's Helpful Hint:
"Valuing foreign securities in \$US"

[Read more HERE](#)

Notes:
Thu, Jul 2: Our office will be closing at 3:00p EDT for the Independence Day holiday weekend. Online services will still be available.

Fri, Jul 3: The financial markets are celebrating the Fourth of July holiday and will be closed. Our office will be closed as well but all online services will still be available.

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.

Helpful hint of the week:
"Month-end invoices by email"

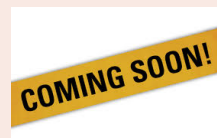
We send our invoices for any month you use our services by email in the second week of the following month. You then have the option to pay by ACH, check, or credit card.

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



Coming Soon:
"A New Version Of WebAppraise"

If you are looking for a web application for your estate, gift, and trust tax valuations, [WebAppraise](#) is worth a look. Although the product has been available for some time, **we will release an updated version in**





July 2026. This iteration will enhance some existing features and include a few additional ones. Some of these include:

1. The ability to save portfolios in our data center or on your premises.
2. The ability to add sales and other transactions to alternate date of death valuations.
3. The ability to import assets to be valued from a CSV (comma-delimited) or Excel file.
4. The ability to export the valuation results to a CSV (comma-delimited), Excel, or PDF file.
5. The ability to process bigger portfolios.
6. Multi-factor authorization and Single Sign On

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

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Category	Solution(s)	Values
<p><u>Enterprise & Automation</u></p> <p>Ideal for large-scale operations.</p>	<p>1. Appraise API</p>	<p>1. Scalable Automation. Secure system-to-system data transfer. No manual process.</p>
<p><u>Convenience & Integration</u></p> <p>ideal for cutting infrastructure costs.</p>	<p>2. Web Appraise</p> <p>3. ESI-Direct</p> <p>*No IT overhead or manual updates.</p>	<p>2. Secure access from anywhere.</p> <p>3. Platform integration with ONESOURCE Trust and Estate Administration software.</p>
<p><u>Specialty & Risk Mitigation</u></p> <p>Ideal for reducing risk exposure.</p>	<p>4. Appraise Outsourcing</p> <p>5. Appraise (Desktop)</p> <p>6. Appraise SaaS</p> <p>*Requires IT involvement to manage third-party Citrix software</p>	<p>4. Expert service and quality assurance.</p> <p>5. Mitigates risk by saving files locally.</p> <p>6. The combined convenience of the web and the risk mitigation of software.</p>

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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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