

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter  
March 26, 2024

## Industry News

**This week's Trust and Estate article is:**  
"How Estate Planning Can Thwart the 'Third-Generation Curse'"

**(Excerpt from actual article):**  
"Thorough communication with heirs about values and various elements of your estate plan could help younger generations better manage their inherited wealth."

You can read the article by clicking [HERE](#).

**Last week's Trust & Estate article was:**  
"Hot Topics for Private Clients and Family Offices from 2024 Heckerling Institute on Estate Planning"

You can read last week's eNewsletter by clicking [HERE](#).

**Weekly Financial Market Review:**  
Our business resides at the intersection of trust & estate law as well as financial data reporting.

We make it easy for our clients to stay current on financial market news by making a weekly market recap available by clicking [HERE](#).



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## Helpful Hint

**This week's Helpful Hint is:**  
"*Inverse Weighting For the Good Friday Weekend*"  
Friday, March 29, is the Good Friday holiday. The stock exchanges are closed while the bond markets are open till 2:00p ET. The Federal Reserve and banks are open as well.

Mean prices are inversely weighted with respect to the number of **trading** days between the valuation date and pricing dates. Because neither Friday, nor Saturday, nor Sunday are trading days for stocks or funds, the mean for a three



day weekend Date-of-Death is the straight average between Thursday and Monday. This is explained in IRS regulation 20.2031-2(b)1 which you can take a closer look at by clicking [HERE](#).

Your best choice, to guarantee the date of death valuation is correct, is to wait until Tuesday to send your portfolio for pricing.

**Last week's Helpful Hint was:  
"Which Continuing Education  
Institutes do you attend?"**

You can read last week's eNewsletter by clicking [HERE](#).

If you want to speak with us, please:  
call: 201-784-8500 x107  
email: [techsupport@appraisenj.net](mailto:techsupport@appraisenj.net)

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## Upcoming Events

(Subject to change - please monitor regularly)

- Fri, Mar 29: The NASDAQ & NYSE will be closed for the Good Friday holiday. We will be closed as well.
- Thu, Apr 18: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- Thu, Apr 25: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.



## Maybe there is a better way?

Why don't you consider us for your [stock and bond valuations for trusts & estates](#)? Maybe there is a better way than how you are doing them now!

We've been providing these valuations since 1985 and have experience and insight. We can speak with you to potentially identify ways to improve performance and accuracy without hiring additional people.

If you want to speak with us, please:  
call: 201-784-8500 x107  
email: [techsupport@appraisenj.net](mailto:techsupport@appraisenj.net)



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