

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
April 2, 2024

Industry News

This week's Trust and Estate article is:
"SCOTUS Hears Arguments in Estate Tax Life Insurance Stock Redemption Case"

(Excerpt from actual article):

The Supreme Court heard oral arguments to settle a circuit court split over whether life insurance proceeds following a shareholder's death that are intended for a closely held corporation's stock redemption are included in its valuation for estate tax purposes.

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

Last week's Trust & Estate article was:
"How Estate Planning Can Thwart the 'Third-Generation Curse'"

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](#).



Helpful Hint

This week's Helpful Hint is:
"Exporting trust and estate valuations to ONESOURCE Trust & Estate software"

Our clients are able to export their ESI-APPRAISE trust and estate valuations in ONESOURCE format. The values can then be imported into the ONESOURCE software saving time and improving accuracy.

Last week's Helpful Hint was:
"Inverse Weighting For the Good"



Friday Weekend"

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

Upcoming Events

(Subject to change - please monitor regularly)

- 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.

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