

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
April 16, 2024

Industry News

This week's Trust and Estate article is:
"Q1 In Review: The Trending Topics That Affect Family Offices"

(Excerpt from actual article):
Looking into the major news headlines of the first quarter of the year, the family office market has lost none of its pace. Monitoring services have picked up on 130 significant articles from major news platforms on the topic of family offices, and the changes that affect them.

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

Last week's Trust & Estate article was:
"IRS Form W-9 Changes And Their Impact On Trusts And Estates"

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:
"What a fantastic service!"
We recently received this compliment from a client:
"What a fantastic service! My request for your report was honored by a woman of your company and the response from her was received in less than five minutes. Information provided was thorough and accurate."

Last week's Helpful Hint was:
"What do I do if a security with a legitimate CUSIP, SEDOL, or Ticker



does not price?"

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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