

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
April 23, 2024

Industry News

This week's Trust and Estate article is:
"How Higher Interest Rates Change Tax And Estate Planning Strategies"

(Excerpt from actual article):
Many people know how Federal Reserve policies influence the economy and investment markets. But they don't realize how interest rate moves change the results of estate planning strategies..

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

Last week's Trust & Estate article was:
"Q1 In Review: The Trending Topics That Affect Family Offices "

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:
"Inverse Relation Between Interest Rates and Bond Prices"

This week's trusts and estates article (see above) discusses how interest rates affect estate planning. Two cited items impact the valuations we provide for our clients:

1. The usage of CRUTs and GRATs is impacted by interest rates. [Did you know we can value these trusts for you?](#)
2. Interest rates affect the price of bonds which are a significant part of the securities we value. Investopedia has a good explanation which you can read



the by clicking [HERE](#).

Last week's Helpful Hint was:
"What a fantastic service!"

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

Upcoming Events

(Subject to change - please monitor regularly)

- 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 to get your valuations?

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 x103
email: editor@appraisenj.net

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