

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter

April 30, 2024

Trusts & Estates News

This week's Trust and Estate article is:
"Hash Out the Inheritance Now, or Fight Your Family Later"

(Excerpt from actual article):

Death and money aren't fun subjects to bring up over dinner. Yet families who make time for that awkward chat now can spare deep regrets and potentially millions in lost dollars.

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

Last week's Trust & Estate article was:
"How Higher Interest Rates Change Tax And Estate Planning Strategies"

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



Helpful Hint

This week's Helpful Hint is:
"Pricing savings bonds using Appraise"

We were asked if we can value savings bonds historically. We can as the date is not too far in the past. Pricing history begins in 1970.

Last week's Helpful Hint was:
"Inverse Relation Between Interest Rates and Bond Prices"

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



If you want to speak with us, please:
call: 201-784-8500 x111
email: customerservice@appraisenj.net

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](#).



Upcoming Events

(Subject to change - please monitor regularly)

- Thu, May 23: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- Fri, May 24: (3:00p ET) Support will be closing early for the Memorial Day Holiday. All online services will be available.



Is there a better way to prepare 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. Our pricing universe contains millions of US and foreign securities with corresponding decades of history. We can speak with you to potentially identify ways to improve accuracy, productivity, and output.

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