

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

May 7, 2024

## Trusts & Estates News

**This week's Trust and Estate article is:**  
"Forgoing marriage? Estate planning for unmarried couples"



**(Excerpt from actual article):**

While many couples choose to live together as a precursor to marriage these days, more and more are choosing to skip marriage altogether, even while raising children and owning property together. This makes estate planning more urgent than it typically might be for married couples. Forgoing the legal entanglement of marriage can lead to troubling outcomes should one member of the couple face incapacity or an untimely death.

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

**Last week's Trust & Estate article was:**  
"Hash Out the Inheritance Now, or Fight Your Family Later"

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

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## Helpful Hint

**This week's Helpful Hint is:**  
"Estate & Gift Tax or EZPrice?"

Our software and software as a service clients have a choice between selecting an Estate & Gift Tax valuation or an EZPrice valuation. What is the difference? Estate & Gift Tax valuations satisfy the stringent IRS Forms 706 and 709 requirements. EZPrice is intended for portfolio valuations and does not comply with IRS regulations. EZPrice valuations are lower cost than Estate & Gift Tax valuations.



**Last week's Helpful Hint was:**  
"Pricing savings bonds using

## Appraise"

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](mailto:customerservice@appraisenj.net)

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## 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 still 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.



Click [HERE](#) for a list of valuations we provide and how you can get them.

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