

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

May 21, 2024

### Trusts & Estates News

This week's Trust and Estate article is:  
**"Key Tax Provisions That Are Expiring After 2025"**

(Excerpt from actual article):

Unless Congress decides to act, lots of tax changes will take effect in 2026, including higher tax rates and lower standard deductions.

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

Last week's Trust & Estate article was:  
**"Prepare large estates for TCJA sunset now"**

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



### Helpful Hint

This week's Helpful Hint is:  
**"Queries about our API service"**

We've been receiving more inquiries related to our Appraise API (Application Programming Interface) service lately. Appraise API, which is popular with enterprise level clients, provides a secure interface that streamlines portfolio pricing. This is done by allowing clients to program into our proprietary Appraise system and use it for their reporting needs. No personal or client data is exchanged. This puts control in the hands of our clients, giving them the freedom to construct and process their reports how they would like to. Some of our clients have even automated this process! If you are looking for a way to cut costs, improve efficiency, and improve your processing metrics please contact us today.

Last week's Helpful Hint was:  
**"Daily Dividends for Mutual Funds"**



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](#).



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## 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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