

APPRAISE

By Evaluation Services, Inc.
Makes it Simple!

*Quick, Accurate, and Economical
Historical Stock & Bond Valuations
for Trusts and Estates*

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
June 25, 2024

Trusts & Estates News

This week's Trust and Estate article is:
"Estate Planning To Protect
Generational Wealth Transfers:
Lessons From The Gilded Age."

(Excerpt from actual article):
HBO's The Gilded Age dramatizes the
privileged lives of some of America's
wealthiest families in late 19th century
New York City. In U.S. history, the Gilded
Age covers the 1870s to the late 1890s.

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

Last week's Trust & Estate article was:
"High Court Estate Tax Ruling Forces
Succession Planning Revamps"
You can read last week's eNewsletter by
clicking [HERE](#).



Helpful Hint

This week's Helpful Hint is:

"Which IRS regulations are applied to estate and gift tax valuations?"

Here is a link to a summary of the IRS regulations we apply to estate and gift tax valuations:

<https://newappraiseesi.com/IrsReg.aspx>

Last week's Helpful Hint was:

"Wed, Jun 26 Webinar: "Estate & Gift Tax Valuations in the Cloud"

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



Helpful hints

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)


- **Wed, Jul 3:** The NASDAQ & NYSE are closing at 1:30p EDT for the Independence Day holiday. We will be closing at 1:30p EDT as well. All online services will be available.
- **Thu, Jul 4:** We will be closed for the NASDAQ & NYSE Independence Day holiday. All online services will be available.
- **Thu, Jul 18:** (5:00p EDT) System Maintenance - all online services will be unavailable with service being restored within a few hours.



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



There's a way to do it better - find it.

Thomas A. Edison

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.

If you want to speak with us, please:

call: 201-784-8500 x111

email: customerservice@appraisenj.net

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