

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
March 12, 2024

Industry News

This week's Trust and Estate article is:
"Rich People Rush to Offload Wealth Before Estate Tax Break Drops"

(Excerpt from actual article):
"Wealthy taxpayers are hurrying to use the increased estate tax exemption amount before it potentially expires at the end of 2025."

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

Last week's Trust & Estate article was:
"Estate Planning For Singles"

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:
"Two New Research Products"
We are pleased to announce that we have added two new research products!

- If you are pricing options (calls & puts) and do not have the required identifier, our new Options Lookup product may just be the answer you are looking for.
- If you are pricing equities and funds using Appraise, and do not have the required identifier to do so, our new Ticker Symbol Lookup product may just be the answer you are looking for.



If you have questions, and/or want to try

the service out please:
email techsupport@appraisenj.net or
call 201-784-8500 x107.

**Last week's Helpful Hint was:
"Why people have been inquiring
about APPRAISE Software as a
Service for valuations"**

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

If you want to speak with us, please:
call: 201-784-8500 x107
email: techsupport@appraisenj.net

Upcoming Events

(Subject to change - please monitor regularly)

- Thu, Mar 14: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- Fri, Mar 29: The NASDAQ & NYSE will be closed for the Good Friday holiday. We will be closed as well.



Maybe there is a better way?

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 x107
email: techsupport@appraisenj.net



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