

# 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  
July 2, 2024

## Trusts & Estates News

This week's Trust and Estate article is:  
"A Crucial Window for Estate  
Planning: Preparing for 2026  
Changes"

(Excerpt from actual article):

Contrary to common belief, the benefits of estate planning aren't exclusive to the ultra-wealthy. The mid-affluent—individuals and married couples poised for significant asset growth—should also consider their future tax exposure..

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

Last week's Trust & Estate article was:  
"Estate Planning To Protect  
Generational Wealth Transfers:  
Lessons From The Gilded Age."

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



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## Helpful Hint

**This week's Helpful Hint is:**  
**"How can I have ESI-APPRAISE prepare the valuation for me if I don't want to do it myself?"**

We have an outsourcing service. If you want us to prepare the valuation for you, please complete our [OUTSOURCING ORDER FORM](#), and email it to us with a list of holdings or statement closest to the valuation date.



**Last week's Helpful Hint was:**  
**"Which IRS regulations are applied to estate and gift tax valuations?"**

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

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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)

- **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.



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## 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.

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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