

# 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  
August 20, 2024

## Trusts & Estates News

This week's Trust and Estate article is:  
**"Succession: The Brewing  
Controversy Over The Murdoch Family  
Trust"**

**(Excerpt from actual article):**

The Murdoch Family Trust, a key player in controlling Rupert Murdoch's vast media empire, (which includes Fox News, The Wall Street Journal, and the New York Post) is at the center of a significant controversy. This unfolding drama over its future has been reported by the New York Times. While the focus here is on family businesses, the principles discussed are equally applicable to artists, collectors, and anyone managing high emotional and financial value assets.

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

Last week's Trust & Estate article was:  
**"Back To School...Estate Planning?  
POAs For College Bound Kids"**

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



## Helpful Hint

**This week's Helpful Hint is:  
"Export to comma delimited & Excel"**

We had quite a few queries about our export to Excel function. All of our estate, gift, and trust tax valuations are available in comma delimited and Excel format. This is a great option for clients who need to upload the values into a different application.



Please send us an [EMAIL](#) if you have questions.

**Last week's Helpful Hint was:  
"Gift Tax Regulations for Stocks & Bonds"**

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)

- **Tue, Aug 20:** (5:00p EDT) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- **Fri, Aug 30:** We will be closing at 2:00p ET for the Labor Day holiday weekend.
- **Mon, Sep 2:** NASDAQ & NYSE markets closed for the Labor day holiday. We will be closed as well.



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and bond valuations for trusts & estates?  
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If you want to speak with us, please:  
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