

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 16, 2024

Trusts & Estates News

This week's Trust and Estate article is:
"UBS Sees \$83T Wealth Transfer Over
Next Three Decades"

(Excerpt from actual article):

Almost a third of the world's millionaires
will be in emerging markets by 2028,
according to the Global Wealth Report
2024, as the millionaire population
increases in nearly every country..

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

Last week's Trust & Estate article was:
"How Biden And Trump's Tax And
Estate Planning Proposals Differ"

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



Helpful Hint

This week's Helpful Hint is:
"Why you should take a look at

Appraise SaaS?"

Here are a few reasons you should consider taking a closer look at Appraise SaaS, our Software as a Service solution:

1. You get the updates automatically! Just log in with your account number and you're all set.
2. SaaS installations only require one time information technology certification. Once approved, new versions do not need to go through the certification process again.
3. Although we host the application, all of the data is stored by you to eliminate risk.
4. SaaS is scalable & portable. It is very easy to add, remove, & relocate users.



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

Last week's Helpful Hint was:

"We have options identifiers & ticker symbol research"

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](#).



Upcoming Events

(Subject to change - please monitor regularly)

- **Thu, Jul 25:** (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 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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