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The impending sunset of the Tax Cuts and Jobs Act at the end of 2025 increases the risk that comes with waiting until receipt of an inheritance to implement an estate plan. Clients anticipating a significant inheritance may face a much different potential tax bill than they expected. We’re using life insurance to hedge that risk as well as preserve the flexibility needed to deal with the high level of uncertainty around the future of estate and income taxation.

Interested in learning more? Let’s chat!

#lifeinsurance #estateplanning #taxcutsandjobsact #tcjasunset