**Email Content**

Much of the planning discussion around the upcoming sunset of the Tax Cuts and Jobs Act has focused on the truly wealthy client who has likely been aware of their potential estate tax liability for years. There’s another type of client, however, who is about to be introduced to this issue in a meaningful way for the first time come January 2026. Clients who are currently worth $20MM, as an example, could be worth over $23MM at that point, and find themselves with a potential estate tax liability of over $4MM absent other planning. To make matters worse, this may be the first time these clients have had to even think about this issue.

Drop me a note or give me a call if you want to take a closer look at how we’re designing strategies for clients like these!