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Moderately wealthy clients could be in for a shock in early 2026. Based on the increased estate tax exemption limits put in place with the passage of the Tax Cuts and Jobs Act (TCJA) in 2017, they’ve enjoyed a period of “blissful ignorance” regarding just how large an estate tax bill their heirs could receive from the IRS.

Contact me today to learn how the “crawl in” strategy we’re using for clients like these!

#tcjasunset #estateplanning #estatetaxes