

Dear [Client Name],

You may have heard about potential upcoming changes to the tax code that would lower the threshold for assets impacted by the Estate Tax. Now would be a good time to take a moment and see how this might affect your financial goals and your legacy.

Change is never easy, but there are many tools at our disposal to counter any adverse effects to your portfolio. Protecting your future is my top priority. Let me know if you have any questions or would like to discuss how I can best serve you as these events unfold.

Sincerely,  
[Agent/Advisor Name]