

Dear [Customer Name],

There has been a lot of talk in the news lately about a potential tax increase coming from the new administration. While changes in the tax code have not yet passed, the President has spoken about significant increases in corporate taxation, increases in personal income tax, and lowering the threshold for taxation on estates.

Our job is to ensure that your financial goals are met or exceeded despite changes beyond our control. Now would be a good time to review your portfolio and policies to see what tools we can employ to counter any upcoming increases in taxes and estate taxes. If you would like me to review your current policies and offer suggestions that could improve your position in light of these new proposals, I would be happy to serve you. Change is inevitable, but our ability to best prepare ourselves to attain our goals is absolute.

Sincerely,
[Agent/Advisor Name]