



May 6, 2021

I've had many recent conversations with clients and soon-to-be clients about what financial laws and rules could be changing soon.

The three issues involving potentially huge changes are: capital gains taxes, lifetime credit and gifting amounts and the step up in basis rules when inheriting assets.

The opportunity to take advantage of current laws and capture tax credits for your family will soon disappear. [Click here](#) for a good article on Schwab about estate tax and lifetime gifting ideas.

If you'd like to have a conversation with [our team](#) to discuss some of your ideas and strategies to not miss out on today's opportunities, click the blue button below to schedule a time to talk soon.

P.S. [Here's the link](#) to pick up a copy of my best-selling book, "Stress Free Money."

*Sincerely,*



*Chad W. Willardson*  
WEALTH ADVISOR FOR ENTREPRENEURS

**Certified Financial Fiduciary®**

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Schedule a Call

