



MCM | WEALTH
 COMPREHENSIVE
 WEALTH MANAGEMENT



Your Legacy Planning ROI

(Hypothetical Analysis)

Starting Estate Value = \$15M	10 Yrs.	20 Yrs.	30 Yrs.	40 Yrs.
Estate Value @ 7% Annual Return	\$29.5M	\$58.0M	\$114.9M	\$224.6M
Current Law (Expires 12/31/2025)	\$26.2M Federal Gift/Estate Exemption			
Taxable Estate after Exemption	\$3.3M	\$31.8M	\$88.0 M	\$198.4M
Estate Tax (40%)	\$1.3M	\$12.7M	\$35.2M	\$79.4M
Anticipated Law (Starting 1/1/2026)	\$13.6M Federal Gift/Estate Exemption			
Taxable Estate after Exemption	\$15.9M	\$44.4M	\$100.6M	\$211.0M
Estate Tax (45%)	\$7.2M	\$20.0M	\$45.3M	\$95.0M
Comparison	Tax Savings: Current v. Anticipated			
Estimated Gift/Estate Tax Savings	\$5.8M	\$7.3M	\$10.1M	\$15.6M
Estimated Initial Planning Cost	~\$75,000			
Tax Savings to Planning Cost ROI	78.8X	96.8X	134.3X	207.9X

The values shown in this table are compounded annually at 7% average yearly return. These projections are provided for illustration purposes only. In showing this compounding, MCM Wealth is making no promise or guarantee of future estate values.