



One Big Beautiful Bill Act client email template

Email 1

“A new law that could change your financial strategy”

Subject Line:

Have you heard about the One Big Beautiful Bill?

Body:

Hi [Client First Name],

You may have seen recent headlines about a sweeping new piece of legislation, the **One Big Beautiful Bill Act**, signed into law on July 4, 2025. It includes some of the most significant tax changes we've seen in years, affecting everything from retirement income and overtime pay to deductions, a new type of savings vehicle, and health care programs.

These changes could impact your current financial strategy, or open new opportunities.

I'd love to schedule some time to walk through how this legislation might affect your coverage, savings plans, and long-term goals.



[Insert scheduling link or CTA to reply]

Let's make sure your plan is working as hard as it can under the new rules.

Warm regards,

[Your Name]

[Contact Info]

[Firm info]

[Firm disclosures]

Disclosures:

This information is a general discussion of the relevant federal tax laws provided to promote ideas that may benefit a taxpayer. It is not intended for, nor can it be used by any taxpayer for the purpose of avoiding federal tax penalties. Taxpayers should seek the advice of their own advisors regarding any tax and legal issues specific to their situation.

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One Big Beautiful Bill Act client email template

Email 2:

“Is your strategy still aligned?”

Subject Line:

Tax laws changed. How well is your financial strategy adapting to recent changes?

Body:

Hi [Client First Name],

The **One Big Beautiful Bill Act**¹, signed into law on July 4, 2025, brought with it:

- No federal tax on overtime, tips, or Social Security (within limits)
- New savings tools like “Trump Accounts” for children
- Cuts to key safety net programs like Medicaid and Supplemental Nutrition Assistance Program
- An expanded child tax credit and estate tax changes

While some of these changes may benefit your situation, others may call for a fresh look at your financial strategy—especially if you're planning for retirement, supporting family, or navigating rising health care costs.

I’m here to help you make sense of it all and adjust where needed. Would next week work for a quick review?

👉 [Insert scheduling link or reply CTA]

Let’s keep your future on track.

Best,

[Your Name]

[Contact Info]

[Firm info]

[Firm disclosures]

Disclosures:

1. H.R.1 - One Big Beautiful Bill Act, 119th Congress (2025-2026)

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One Big Beautiful Bill Act client email template

Email 3:

“Don’t Wait to Reassess”

Subject Line:

Your financial strategy may need a checkup—here’s why.

Body:

Hi [Client First Name],

The **One Big Beautiful Bill Act** is already affecting how Americans save, retire, and protect what matters most. With so much change in the financial landscape, now is the right time to reassess your goals, insurance protection, and income strategy.

A quick conversation can help ensure:

- ✓ You’re taking advantage of new tax benefits
- ✓ Your family is protected
- ✓ Your financial strategy reflects today’s opportunities, not yesterday’s rules

I’m currently scheduling review appointments for clients just like you. Let’s get something on the calendar—no pressure, just a proactive step for your financial wellbeing.

 [Insert link or reply to this email]

Looking forward to catching up,

[Your Name]

[Phone] | [Email] | [License info if applicable]

Disclosures:

Please keep in mind that the primary reason to purchase a life insurance product is the death benefit.

Life insurance products contain charges, such as Cost of Insurance Charge, Cash Extra Charge, and Additional Agreements Charge (which we refer to as mortality charges), and Premium Charge, Monthly Policy Charge, Policy Issue Charge, Transaction Charge, Index Segment Charge, and Surrender Charge (which we refer to as expense charges). These charges may increase over time, and (this policy/these policies) may contain restrictions, such as surrender periods. Policyholders could lose money in (this product/these products)..

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