MBL ADVISORS

Summer Newsletter| 2026

Summer History Series

This summer we're running a three part history series looking at the philosophical roots behind some of the biggest areas of American wealth policy: the federal estate tax, federal retirement law, and Employee Stock Ownership Plans. Each of these systems, in its own way, has spent decades wrestling with a version of the same question: how much is enough. How much retirement security is sufficient, how much ownership concentration is healthy, how much inheritance is enough. We'll publish one piece a month this summer, starting with the history of the federal estate tax in July, followed by federal retirement law in August and ESOPs in September. Our hope is to offer historical grounding and inspire curiosity around what "enough" means to you.

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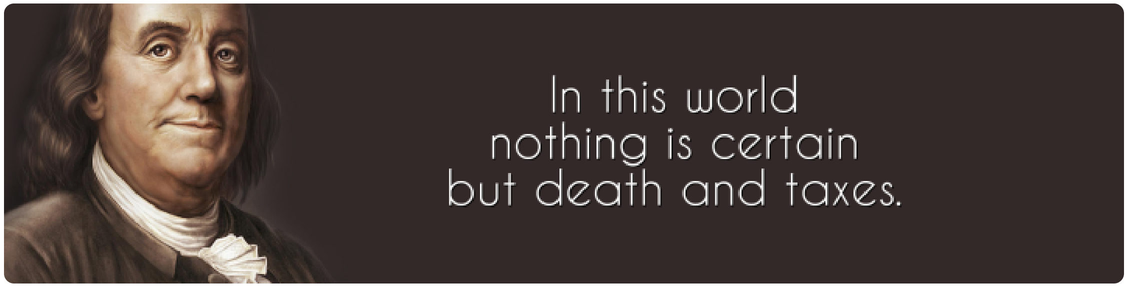
We're kicking things off below with our first piece on the history of the federal estate tax.

Death and Taxes:
A History of the Federal Estate Tax in America



Our first installment traces the federal estate tax from its start as a temporary wartime revenue tool in 1797 through its evolution into a permanent, and often politically charged, feature of the modern tax code. Despite more than a century of debate, the estate tax has rarely raised much money for the federal government relative to the rest of the budget, which raises a real question about what purpose it actually serves. Take a look below for the full history and where things stand today.

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Firm Updates

Welcome, Ryan Gallagher!

We are proud and excited to introduce our newest team member and Investment Analyst, Ryan Gallagher.

Ryan recently graduated from Duke University's Fuqua School of Business MBA program, where he also served as captain of the men's soccer team.

We are excited to have Ryan on board and look forward to the contributions he will make as he supports our team and clients.

Please join us in welcoming Ryan to the team!

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