

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

**RE: Notice of Disengagement - Practice Area Realignment**

Dear [Client Name],

We are writing to inform you that [Law Firm Name] is currently undergoing a strategic realignment of our legal services. As part of this transition, our firm will no longer be providing services in the area of Estate Planning effective [Date].

As a result of this realignment, we must formally conclude our attorney-client relationship regarding your estate planning matters. This disengagement will be effective as of [Closing Date].

**Current Status of Your Matter**

Regarding your file, [Description of current status, e.g., your wills have been executed / your trust is currently unfunded]. To ensure your interests are protected, we recommend that you retain new legal counsel to review your estate plan periodically or to complete any outstanding items.

**File Retention and Transfer**

Your original documents [are enclosed with this letter / are being held in our vault]. If you would like us to transfer your electronic or physical file to a new attorney, please provide us with a written authorization. Otherwise, we will maintain your closed file for [Number] years in accordance with our document retention policy.

**Final Accounting**

[Choose one: Enclosed is a final statement for services rendered through this date / Our records show your account is paid in full / We are processing a refund of your remaining retainer in the amount of \$XXX].

It has been a pleasure serving you. We wish you the best in your future endeavors.

Sincerely,

[Attorney Name]

[Law Firm Name]