

[Your Name]
[Your Firm Name]
[Your Address]
[City, State, Zip Code]
[Email Address]
[Phone Number]

[Date]

[Recipient Name]
[Recipient Firm Name]
[Recipient Address]
[City, State, Zip Code]

RE: Referral for Co-Representation of [Client Name]

Dear [Recipient Last Name],

I am writing to formally introduce [Client Name], a high-net-worth client of our firm, regarding a potential co-representation arrangement. Given your specialized expertise in [Specific Area of Law/Finance], I believe your involvement would be highly beneficial in addressing the complexities of this client's portfolio.

The client's current situation involves [briefly describe the matter, e.g., cross-border estate planning, complex asset litigation, or private equity structuring]. Our firm currently manages [describe your current role], but we recognize that [Client Name] requires the sophisticated technical oversight that your team provides to ensure a comprehensive strategy.

We propose a co-representation model where our firms collaborate to provide seamless service. I have already discussed your firm's reputation with the client, and they are interested in exploring how we might work together.

Please let me know your availability for a brief introductory call to discuss the conflict check process, fee-sharing arrangements (where applicable and ethically permitted), and the specific scope of work.

I look forward to the possibility of collaborating with you on this matter.

Sincerely,

[Your Signature]

[Your Printed Name]
[Your Title]