[Your Name]
[Your Firm/Company Name]
[Your Address]
[Your Phone Number]
[Your Email]

[Date]

[Attorney Name]
[Law Firm Name]
[Address]

RE: Joint Client Wealth Protection Strategy - [Client Names]

Dear [Attorney Name],

I am writing to you regarding our mutual clients, [Client Names], concerning the optimization of their real estate portfolio within their broader estate and wealth protection plan.

As we have discussed, the clients currently hold the following properties: [List Properties/Addresses]. Our objective is to ensure these assets are structured to minimize liability exposure, maximize tax efficiency, and facilitate a seamless transfer to their beneficiaries.

I would like to coordinate with your office to review the following:

- The feasibility of transferring titles into specialized trust vehicles or LLCs.
- Analysis of current deed structures (e.g., Joint Tenancy vs. Community Property with Right of Survivorship).
- Integration of real estate holdings with their existing Pour-Over Will and Revocable Living Trust.
- Potential impact on step-up in basis and estate tax valuations.

Please let me know your availability for a brief call or meeting to align our strategies for the clients' upcoming annual review. I have attached the current property valuations and mortgage statements for your reference.

I look forward to working with you to protect [Client Names]'s legacy.

Sincerely,

[Your Signature]

[Your Printed Name]
[Your Title]