

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

[Date]

[Recipient Name]
[Recipient Title]
[Recipient Company]

Dear [Recipient Name],

I am writing to you because I believe there is a natural synergy between our professional services that could greatly benefit our mutual clients. As a [Your Profession - e.g., Real Estate Professional], I often work with clients navigating significant life transitions where comprehensive estate planning becomes a critical necessity.

Our industries intersect at several vital points:

- **Title and Vesting:** Ensuring property is correctly titled in trusts to avoid probate.
- **Succession Planning:** Assisting heirs and beneficiaries with the valuation or sale of inherited property.
- **Downsizing and Liquidation:** Coordinating the transition for seniors moving into assisted living or smaller homes.
- **Asset Protection:** Integrating high-value real estate holdings into a broader legacy strategy.

I am looking to build a referral network with an estate planning attorney who shares my commitment to client-centric service. I would welcome the opportunity to learn more about your practice and discuss how we might streamline the process for clients who require both legal and real estate expertise.

Are you available for a brief introductory call or a coffee meeting next week? I look forward to hearing from you.

Best regards,

[Your Signature]

[Your Printed Name]