

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

[Date]

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

Subject: Strategic Partnership for Real Estate Portfolio Succession

Dear [Attorney Last Name],

My name is [Your Name] and I specialize in [Your Professional Role, e.g., Commercial Real Estate/Asset Management] at [Your Company].

Many of my clients possess complex real estate portfolios that require sophisticated estate planning to ensure a seamless transition to the next generation. Given your expertise in estate law, I am looking to establish a professional relationship with an attorney to whom I can confidently refer clients who need to protect their property legacies and minimize tax liabilities.

In turn, I often assist families in valuing, restructuring, or liquidating real estate assets during the probate or trust administration process. I believe our services are highly complementary and could provide significant value to our mutual clients.

I would welcome the opportunity to introduce myself and learn more about your practice. Are you available for a brief introductory call or a coffee next week?

I look forward to hearing from you.

Best regards,

[Your Signature]

[Your Printed Name]