

[Your Name]
[Your Real Estate Agency Name]
[Your Address]
[City, State, Zip Code]
[Your Email]
[Your Phone Number]

[Date]

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

Dear [Recipient Name],

My name is [Your Name], and I am a licensed real estate agent with [Agency Name]. I have long admired the reputation of [Estate Planning Firm Name] for providing high-quality legal guidance to clients in our community.

In my real estate practice, I frequently work with clients who are undergoing significant life transitions-such as purchasing a first home, downsizing for retirement, or managing inherited property. These milestones often trigger a critical need for professional estate planning, yet many of my clients do not yet have a trusted legal advisor.

I am writing to propose a formal referral exchange between our firms. My goal is to provide my clients with a direct connection to an expert who can protect their new assets, while also serving as a resource for your clients who may require professional real estate services for estate liquidations, valuations, or trust-related sales.

I believe our businesses share a commitment to client-first service and integrity. I would welcome the opportunity to meet briefly, either in person or via a short call, to discuss how we might support each other's clients and ensure they receive the highest level of care.

Please let me know if you have any availability next week for a brief introduction.

Sincerely,

[Your Signature]

[Your Printed Name]
[Your License Number/Title]