

Date: [Insert Date]

To: [Recipient Name/Title]
[Firm/Organization Name]
[Address Line 1]
[Address Line 2]

RE: CONFIDENTIAL Estate Valuation Referral - Estate of [Name of Deceased]

Dear [Recipient Name],

I am writing to formally refer the valuation of the aforementioned estate to your firm for professional assessment. This matter is strictly confidential and pertains to the transition of assets for the estate of [Name of Deceased].

The estate consists of the following primary asset categories requiring valuation:

- [Asset Type 1: e.g., Residential Real Estate]
- [Asset Type 2: e.g., Commercial Holdings]
- [Asset Type 3: e.g., Personal Property/Antiques]
- [Asset Type 4: e.g., Securities/Business Interests]

The purpose of this valuation is for [Reason: e.g., probate filing, federal estate tax calculation, or equitable distribution]. We require a comprehensive report that meets [Specific Standard: e.g., USPAP or IRS] requirements by no later than [Due Date].

Please find enclosed the preliminary documentation regarding the assets. You are authorized to contact [Contact Person Name] at [Phone/Email] to arrange site visits or access additional records. All information shared during this process must remain privileged and confidential.

Please provide a formal engagement letter and an estimate of your fees before commencing the full valuation process.

Thank you for your professional assistance in this matter.

Sincerely,

[Your Signature]

[Your Printed Name]
[Your Title/Role, e.g., Executor or Attorney]
[Your Contact Information]