

[Your Name/Company Name]

[Your Address]

[City, State, Zip Code]

[Phone Number]

[Email Address]

[Date]

[Recipient Name]

[Business Name]

[Recipient Address]

[City, State, Zip Code]

Dear [Recipient Name],

Subject: Strategic Real Estate Succession Planning for Your Retirement

As you approach your well-deserved retirement, the future of your business operations is likely a primary focus. However, the commercial real estate assets tied to your business represent a significant portion of your net worth and require a distinct transition strategy.

Proper real estate succession planning ensures that your property continues to provide value, whether you intend to sell the assets, lease them back to a successor, or transfer ownership to the next generation. Without a clear plan, you risk unnecessary tax liabilities or a loss of equity during the transition.

We specialize in helping retiring business owners navigate these complexities by focusing on:

- Current market valuation of your real estate holdings.
- Analysis of lease-back vs. outright sale scenarios.
- Tax-efficient transfer strategies.
- Alignment of property disposal with your overall retirement timeline.

I would welcome the opportunity to discuss how we can secure your legacy and maximize the value of your real estate portfolio. Please let me know if you are available for a brief introductory call on [Date] at [Time].

Thank you for your time and for your contributions to our business community.

Sincerely,

[Your Signature]

[Your Printed Name]

[Your Title]