

[Your Name/Company Name]

[Your Address]

[City, State, Zip Code]

[Phone Number]

[Email Address]

[Date]

[Attorney Name]

[Law Firm Name]

[Address]

[City, State, Zip Code]

Re: Financial Planning Services for Estate of [Deceased Name]

Dear [Attorney Last Name],

I am writing to formally refer my client, [Client Name], who is currently serving as the [Executor/Administrator] for the estate of [Deceased Name].

As their financial planner, I have been assisting with the initial gathering of financial records and asset valuations. However, the estate has now reached a stage where formal legal probate proceedings are required. I have recommended your firm based on your expertise in probate law and estate settlement.

To assist with your initial review, I have prepared the following documents (with the client's consent):

- Current summary of investment accounts and balances
- List of known life insurance policies
- Contact information for relevant financial institutions

I would appreciate being kept informed of any legal requirements that may impact the client's long-term financial strategy or tax liabilities during this transition. Please let me know if there are specific forms or information you require from my office to expedite the process.

[Client Name] will be contacting your office shortly to schedule an initial consultation. Thank you for providing your professional guidance to them during this difficult time.

Sincerely,

[Your Signature]

[Your Printed Name]

[Your Title/Credentials]