

[Your Name/Firm Name]

[Your Address]

[City, State, Zip Code]

[Phone Number]

[Email Address]

[Date]

[Recipient Name]

[Recipient Firm Name]

[Recipient Address]

[City, State, Zip Code]

RE: Referral of [Client Name] for Estate Services

Dear [Recipient Name],

I am writing to formally refer my client, [Client Name], to your office for assistance with [Estate Planning / Estate Administration / Probate Matters].

I have provided professional tax and accounting services for [Client Name] for [Number] years. During our recent review of their financial position, we identified a need for specialized expertise regarding [mention specific need, e.g., federal estate tax filings, trust accounting, or succession planning].

I believe your firm is well-suited to address these requirements. I have advised the client to contact your office directly to schedule a consultation. With the client's written authorization, I am prepared to share relevant financial statements, tax returns, and asset valuations to facilitate your review.

Please let me know if you require any preliminary information before meeting with them. I look forward to collaborating with you to serve our mutual client's best interests.

Sincerely,

[Your Signature]

[Your Printed Name]

Certified Public Accountant