

[Date]

[Client Name]  
[Client Address]  
[City, State, Zip Code]

Dear [Client Name],

Thank you for the opportunity to meet with you on [Date of Visit] to evaluate your family estate at [Property Address]. I appreciate the time you took to walk me through the home and share the history of your collection.

Following our onsite assessment, I have completed the preliminary evaluation of your items. Based on our discussion regarding your goals for downsizing, I have outlined the recommended next steps below:

- **Valuation Summary:** A detailed list of items identified for potential sale, donation, or retention is attached to this letter.
- **Proposed Timeline:** Based on your moving date of [Date], we suggest beginning the removal process by [Date].
- **Service Options:** We are prepared to assist with [Auction Placement / Estate Sale Coordination / Shipping and Storage].

I understand that downsizing a family estate is a significant transition. My goal is to make this process as organized and stress-free as possible for you and your family.

Please let me know if you have any questions regarding the attached valuation or if you would like to move forward with the next phase of the project. I will follow up with a phone call on [Day of Week] to discuss your thoughts.

Sincerely,

[Your Name]  
[Your Title]  
[Your Company Name]  
[Your Phone Number]  
[Your Email Address]