

Strictly Private and Confidential

Addressed to: [Recipient Name / Legal Representative Name]

Date: [Insert Date]

RE: Initial Proposal for Financial Asset Apportionment and Settlement

Dear [Name],

This letter outlines an initial proposal for the apportionment of marital assets following our recent discussions regarding the dissolution of [Marriage/Partnership Name]. This proposal is made on a "without prejudice" basis and is subject to full financial disclosure by both parties.

Based on the current understanding of the global marital estate, which includes real estate holdings, investment portfolios, business interests, and liquid assets, the following apportionment is proposed:

- **Real Estate:** [Detail proposed split of primary residence, secondary homes, and investment properties].
- **Investment Portfolios:** [Detail proposed division of brokerage accounts, hedge funds, and private equity].
- **Business Interests:** [Outline proposed treatment of shareholdings, dividends, or buyout terms].
- **Liquid Assets and Cash:** [Detail proposed distribution of bank accounts].
- **Retirement and Pensions:** [Outline proposed pension sharing or offsetting].

This proposal aims to achieve a fair and equitable distribution that reflects the contributions of both parties while ensuring the continuity of lifestyle and financial security. We suggest a structured timeline for the exchange of formal Financial Statements (Form E or equivalent) to verify these valuations.

We believe that an amicable settlement is in the best interest of all involved to avoid protracted litigation and unnecessary costs. We look forward to receiving your response or a counter-proposal by [Insert Date].

Yours sincerely,

[Your Signature]

[Your Printed Name]