

[Your Name/Company Name]

[Your Address]

[City, State, Zip Code]

[Phone Number]

[Email Address]

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Dear [Client Name],

Subject: Significant Inheritance and Wealth Protection Review

We are writing to you regarding the recent transition of assets to your estate. Managing a significant inheritance requires careful planning to ensure long-term financial security and the preservation of your family's wealth.

In light of these changes, we recommend a comprehensive Wealth Protection Review. The objective of this review is to address the following key areas:

- **Tax Optimization:** Assessing the impact of inheritance taxes and identifying strategies to minimize future liabilities.
- **Asset Protection:** Implementing structures to safeguard your new assets from potential legal claims or volatility.
- **Estate Planning:** Updating your will, trusts, and beneficiary designations to reflect your current financial status.
- **Investment Strategy:** Rebalancing your portfolio to align with your updated risk tolerance and long-term goals.

Our goal is to provide you with a structured roadmap that secures your financial legacy and provides peace of mind for the future.

Please contact our office at [Phone Number] or [Email Address] to schedule a confidential consultation at your earliest convenience.

Sincerely,

[Your Signature]

[Your Printed Name]

[Your Title]