[Your Name/Law Firm Name]
[Address]
[City, State, Zip Code]
[Phone Number]
[Email]

[Date]

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

Re: Estate Planning and Trust Administration for [Name of Estate/Trust]

Dear [Client Name],

Thank you for choosing [Firm Name] to assist with your estate planning and trust administration needs. This letter serves to outline the initial steps and the documentation required to ensure your assets are managed and distributed according to your wishes.

Based on our recent consultation, we will be focusing on the following areas:

- Review and update of Last Will and Testament
- Review of existing Revocable and Irrevocable Trusts
- Evaluation of Power of Attorney and Healthcare Directives
- Verification of beneficiary designations on financial accounts
- Guidance on Trustee duties and fiduciary responsibilities

To move forward, please provide the following documents by [Deadline Date]:

- Copies of current deeds for real estate holdings
- Latest statements for investment and retirement accounts
- Existing estate planning documents
- Contact information for all named beneficiaries and trustees

Once we have reviewed these materials, we will schedule a follow-up meeting to finalize the administration strategy and execute any necessary legal instruments.

If you have any questions regarding the process or the requested information, please do not hesitate to contact our office.

Sincerely,

[Signature]
[Printed Name]
[Title]