

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Re: Conflict of Interest and Referral for Estate Planning Services

Dear [Client Name],

Thank you for contacting [Law Firm Name] regarding your estate planning matters. We appreciate the opportunity to be of service to you.

After reviewing our records and the information provided, we have identified a potential conflict of interest that prevents our firm from representing you in this specific matter. Professional ethical standards require that we decline representation when a conflict exists to ensure that your legal interests are protected without compromise.

To ensure you receive the necessary legal assistance, we recommend that you contact one of the following estate planning attorneys/firms, who may be able to assist you:

- [Referral Name 1] - [Phone Number] - [Email/Website]
- [Referral Name 2] - [Phone Number] - [Email/Website]
- [Referral Name 3] - [Phone Number] - [Email/Website]

Please be advised that we have not performed a substantive review of your legal position, and this letter does not constitute legal advice. Because estate planning matters often involve time-sensitive issues and deadlines, we encourage you to contact another attorney immediately.

We will keep all information you have shared with us confidential in accordance with our professional obligations. We are returning any original documents you provided to us along with this letter.

Thank you for your understanding. We wish you the best in resolving this matter.

Sincerely,

[Attorney Name]

[Law Firm Name]