

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

[Recipient Name]
[Recipient Law Firm]
[Recipient Address]
[City, State, Zip Code]

Re: Referral of [Client Name] for [Estate Planning/Probate] Services

Dear [Recipient Name],

I am writing to formally refer [Client Name] to your office for legal assistance regarding [Estate Planning/Probate matters].

[Client Name] requires professional guidance in the following areas:

- [Specific Need: e.g., Drafting of Last Will and Testament]
- [Specific Need: e.g., Creation of Living Trusts]
- [Specific Need: e.g., Administration of the Estate of (Deceased Name)]
- [Specific Need: e.g., Powers of Attorney and Healthcare Directives]

I have informed the client of your expertise in this field, and they are expecting your contact. I have also enclosed [relevant documents/summary of assets] with the client's consent to assist in your initial review.

Please let me know if you accept this referral and if there are any specific intake procedures the client should follow. I look forward to your confirmation.

Sincerely,

[Your Signature]
[Your Printed Name]