

Date: [Insert Date]

To: [Attorney Name/Law Firm]

[Address]

[City, State, Zip Code]

From: [Caseworker/Agency Name]

[Address]

[Phone Number]

Subject: Referral for Post-Adoption Trust Formation

Dear [Attorney Name],

I am writing to formally refer the [Last Name] family for legal assistance in establishing a post-adoption trust. The adoption of [Child's Name] was finalized on [Date], and the family is now seeking to secure the child's financial future and manage any specific post-adoption subsidies or inheritance assets.

Family Information:

- **Adoptive Parents:** [Names of Parents]
- **Child's Name:** [Child's Name]
- **Child's Date of Birth:** [DOB]
- **Case Reference Number:** [Reference Number]

Purpose of Trust:

The family intends to establish a [Special Needs Trust / Discretionary Trust / Educational Trust] to manage the following:

[List specific funds, such as Adoption Assistance payments, personal inheritance, or insurance payouts].

Please contact the family directly at [Phone Number] or [Email] to schedule an initial consultation. Should you require any documentation regarding the adoption decree or subsidy agreements from our agency, please let me know.

Thank you for your expertise in this matter.

Sincerely,

[Signature]

[Printed Name]

[Title]

[Agency Name]