

[Date]

[Attorney Name]

[Law Firm Name]

[Address]

[City, State, Zip Code]

Dear [Attorney Name],

I am writing to formally refer my clients, [Client Names], to your firm for specialized estate planning services.

As a blended family, [Client Names] have expressed specific concerns regarding the protection of their biological children's inheritance, the provision for the surviving spouse, and the potential for future conflicts. Given your expertise in navigating the complexities of step-family dynamics and multi-generational wealth transfer, I believe you are the best person to assist them.

We have already discussed the following preliminary items:

- Current asset structure and titling.
- Beneficiary designations on retirement accounts.
- Specific intentions regarding the family residence.

I have advised them to schedule an initial consultation with your office. Please let me know if there are specific documents or intake forms you would like them to complete prior to that meeting.

Thank you for providing your professional guidance to my clients. I look forward to collaborating with you to ensure their financial and legacy goals are met.

Sincerely,

[Your Name]

[Your Title]

[Your Company]