

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Re: Post-Settlement Estate Planning

Dear [Client Name],

Congratulations on the recent settlement of your legal matter. Now that your case has concluded and you have received your settlement funds, it is an ideal time to review your long-term financial security.

Significant changes in assets often require updates to your estate plan. To ensure your recovery is protected and managed according to your wishes, I recommend consulting with an estate planning attorney. They can assist you with:

- Creating or updating a Last Will and Testament.
- Establishing trusts to manage and protect your settlement proceeds.
- Designating powers of attorney and healthcare directives.
- Minimizing potential tax liabilities.

I have worked closely with [Name of Estate Planning Attorney/Firm] at [Phone Number/Email]. They specialize in assisting clients with post-settlement planning, and I believe they would be an excellent resource for you.

Please feel free to contact my office if you have any questions regarding your case file or if you would like a formal introduction to the firm mentioned above.

It has been a pleasure representing you.

Sincerely,

[Your Name]

[Your Law Firm Name]