

[Your Name/Company Name]

[Your Address]

[City, State, Zip Code]

[Phone Number]

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Dear [Client Name],

I am writing to you today because of the significant life changes you have recently experienced regarding [mention transition, e.g., the birth of your child / your recent marriage / your retirement]. Congratulations on this new chapter.

During major life transitions, it is often a wise time to review your long-term financial and legal protections. Ensuring that your estate plan accurately reflects your current situation is essential for protecting your assets and providing peace of mind for your family.

I would like to recommend [Attorney Name] at [Law Firm Name]. They specialize in estate planning and have helped many of my clients navigate similar transitions with professionalism and care. You can reach them at [Attorney Phone Number] or [Attorney Email].

I have taken the liberty of providing them with your contact information, and they may reach out to you shortly to offer a consultation. Alternatively, please feel free to contact them directly at your earliest convenience.

It is a pleasure working with you, and I am here to support you through this transition in any way I can.

Best regards,

[Your Signature]

[Your Printed Name]

[Your Title]