

**Date:** [Date]

**To:**

[Recipient Name]  
[Recipient Title/Firm]  
[Address]  
[City, State, Zip Code]

**From:**

[Your Name]  
[Your Title/Firm]  
[Address]  
[City, State, Zip Code]

**Subject:** Referral for Trust Creation regarding Asset Division: [Client Name(s)]

Dear [Recipient Name],

I am writing to formally refer my client(s), [Client Name(s)], to your office for legal assistance in establishing a trust to facilitate the division of assets.

The parties are currently in the process of [Briefly state context, e.g., marital dissolution, estate settlement, or corporate restructuring]. As part of the settlement agreement, it has been determined that certain assets must be placed into a trust to ensure equitable distribution and long-term management.

**Details of the Matter:**

- **Client Contact Information:** [Phone Number / Email]
- **Nature of Assets:** [List assets, e.g., Real Estate, Investment Accounts, Business Interests]
- **Primary Objective:** [e.g., Creation of a QDRO, Spousal Support Trust, or Inherited Asset Protection]
- **Timeline:** [Specify any court-ordered or agreed-upon deadlines]

I have advised the client(s) to contact your office directly to schedule an initial consultation. Please let me know what documentation or preliminary information you require from my file to assist with your intake process.

Thank you for your professional assistance in this matter. I look forward to working with you to finalize this transition for the client(s).

Sincerely,

[Your Signature]

[Your Printed Name]