

[Date]

[Recipient Name]

[Recipient Firm/Company]

[Address Line 1]

[City, State, Zip Code]

**Re: Referral of [Client Name] regarding [Specific Benefit Matter]**

Dear [Recipient Name],

I am writing to formally refer my client, [Client Name], to your office for legal counsel regarding specific employee benefits and ERISA-related matters.

While I currently represent [Client Name] in relation to [General Employment Law Matter, e.g., employment contract negotiations or separation], several complexities have arisen that fall under your expertise in benefits law. Specifically, the client requires guidance on:

- [Issue 1: e.g., COBRA continuation coverage]
- [Issue 2: e.g., Qualified Retirement Plan distributions]
- [Issue 3: e.g., Stock option vesting and 409A compliance]

I have advised the client that your practice specializes in these areas. I have also enclosed/attached relevant documents with the client's consent for your preliminary review.

Please let me know if you are available to consult with [Client Name]. I look forward to coordinating our efforts to ensure the client's interests are fully protected.

Sincerely,

[Your Name]

[Your Law Firm]

[Your Phone Number]

[Your Email Address]

cc: [Client Name]