

[Date]

[Recipient Name]

[Recipient Title]

[Law Firm/Service Provider Name]

[Address]

[City, State, Zip Code]

Subject: Referral of Corporate Intellectual Property Portfolio Management

Dear [Recipient Name],

I am writing to formally refer [Client/Company Name] to your firm for the comprehensive management of their intellectual property portfolio.

The portfolio currently consists of:

- [Number] Registered Patents and Pending Applications
- [Number] Trademark Registrations
- [Other IP Assets, e.g., Copyrights or Trade Secrets]

The scope of the required services includes:

- Maintenance and renewal filings
- Docketing and deadline monitoring
- Strategic filing advice and expansion
- Portfolio auditing and valuation
- Enforcement and defense strategies

I have advised [Client Contact Name] that your firm possesses the specific expertise required to manage their assets across [List Jurisdictions/Countries]. I have copied them on this correspondence to facilitate a direct introduction.

Please let us know your availability for an initial consultation to discuss the transition of files and the execution of necessary powers of attorney.

Sincerely,

[Your Name]

[Your Title]

[Your Organization]

[Phone Number]

[Email Address]

cc: [Client Contact Name]