

[Your Name]  
[Your Company Name]  
[Your Address]  
[Your Phone Number]  
[Your Email]

[Date]

[Recipient Name]  
[Recipient Company Name]  
[Recipient Address]

Dear [Recipient Name],

I am writing to formally refer my client, [Client Name], to you for assistance with [Estate Planning / Tax Preparation] services.

[Client Name] is currently looking for professional guidance regarding [mention specific needs, e.g., drafting a will, establishing a trust, filing complex returns, or inheritance tax planning]. Based on your expertise in this field, I believe your services would be a great fit for their specific requirements.

I have provided the client with your contact information, and they should be reaching out to you shortly to schedule a consultation. I have also attached [mention any relevant documents, with client permission] to help you prepare for the initial meeting.

Please let me know if you require any further information from my side to facilitate this transition. I look forward to working alongside you to ensure the client's financial and legal goals are met.

Sincerely,

[Your Signature]

[Your Printed Name]