

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

[CPA Name]  
[CPA Firm Name]  
[Address]  
[City, State, Zip Code]

Dear [CPA Name],

Re: Referral for [Client Name]

I am writing to formally refer my client, [Client Name], to your firm for professional consultation regarding business formation and tax structuring. [Client Name] is currently in the process of establishing a new venture, [Proposed Business Name], which will focus on [Brief Description of Business Activity].

Specifically, the client requires your expertise in the following areas:

- Selection of the most tax-efficient entity type (e.g., LLC, S-Corp, C-Corp).
- Review of the proposed ownership structure and capital contributions.
- Guidance on federal and state tax registration and compliance.
- Advice on long-term tax planning and election deadlines.

I have advised the client to contact your office directly to schedule an initial consultation. Alternatively, you may reach them at [Client Phone Number] or [Client Email Address].

Please let me know if there are any specific documents or background information you require from my side to facilitate this transition. I look forward to working alongside you to ensure the successful launch of [Client Name]'s business.

Sincerely,

[Your Signature]  
[Your Printed Name]  
[Your Title]