

[Date]

[CPA Name]

[Accounting Firm Name]

[Address]

[City, State, Zip Code]

Dear [CPA Name],

I am writing to formally refer my client, [Client Name], the owner of [Client Business Name], to you for professional consultation regarding business succession planning.

As [Client Name] begins to evaluate the long-term future of their company, we have identified a need for expert guidance on the tax implications, business valuation, and financial structuring involved in a leadership transition or sale. Given your expertise in tax strategy and corporate accounting, I believe your insights would be invaluable in ensuring a smooth and tax-efficient transfer of ownership.

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

I look forward to collaborating with you to help our mutual client achieve their succession goals. Please let me know if you require any additional background information.

Sincerely,

[Your Name]

[Your Title]

[Your Company]

[Your Phone Number]