

Subject: Referral for Tax Advice Regarding Real Estate Transaction: [Property Address]

Dear [Tax Professional Name],

I am writing to introduce my client, [Client Name], who is currently in the process of [Buying/Selling] a property located at [Property Address].

As their real estate agent, I am assisting with the transactional aspects of this deal. However, due to the specific nature of this transaction, we have identified several areas where professional tax guidance is necessary. We would like your expertise to review the potential tax implications, including but not limited to:

- Capital gains tax liability
- 1031 Exchange eligibility (if applicable)
- Potential property tax reassessments
- Deductibility of closing costs and interest
- [Additional Specific Concern]

I have advised [Client Name] that I do not provide legal or tax advice and that they should rely solely on a qualified professional for these matters. [Client Name] is cc'd on this email and will reach out to you shortly to schedule a consultation. I am happy to provide any copies of the purchase agreement or closing statements you may require.

Thank you for your assistance.

Best regards,

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