[Attorney Name]
[Law Firm Name]
[Address]
[City, State, Zip Code]
[Phone Number]
[Email]

[Date]

[Advisor Name]
[Wealth Management Firm Name]
[Address]
[City, State, Zip Code]

RE: Referral of [Client Name(s)]

Dear [Advisor Name],

I am writing to formally introduce my clients, [Client Name(s)], who are currently in the process of developing their comprehensive estate plan. During our legal consultations, it became clear that they would benefit from professional wealth management and investment oversight to ensure their financial strategy aligns with their long-term estate goals.

I have recommended your services to them based on your expertise in [specific area, e.g., high-net-worth planning/retirement preservation]. Specifically, we are looking to coordinate on the following:

- Review of asset titling and beneficiary designations.
- Integration of their investment portfolio with the newly created [Trust Name/Estate Plan].
- Funding strategies for their testamentary vehicles.

I have advised [Client Name(s)] to contact your office directly to schedule an initial meeting. Once they have provided the necessary authorizations, I am available to share relevant legal documents or participate in a joint meeting to ensure a seamless transition between the legal and financial components of their plan.

I look forward to working together to serve the best interests of [Client Name(s)].

Sincerely,

[Signature]

[Attorney Name]
[Law Firm Name]