

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Dear [Client Name],

It has been a pleasure representing you regarding [Specific Legal Matter/Estate Planning]. As we work to protect your legal interests, I want to ensure that your financial goals and long-term wealth strategies are equally well-managed.

In our experience, legal structures are most effective when coordinated with professional wealth management. To that end, I am writing to recommend the services of [Name of Wealth Management Firm/Advisor]. We have worked closely with their team in the past and have found their expertise in [Investment Management/Retirement Planning/Tax Strategy] to be of the highest caliber.

I have taken the liberty of enclosing their brochure for your review. Should you be interested, I would be happy to facilitate a formal introduction or join you for an initial consultation to ensure your legal and financial plans are fully aligned.

Please note that [Law Firm Name] does not receive any referral fees or financial compensation for this recommendation; our goal is simply to ensure you have access to the best possible resources for your overall financial health.

Thank you for your continued trust in our firm.

Sincerely,

[Attorney Name]

[Law Firm Name]