

PRIVILEGED AND CONFIDENTIAL

[Date]

[Wealth Advisor Name]

[Firm Name]

[Address]

[City, State, Zip Code]

RE: Introduction regarding [Client Name]

Dear [Advisor Name],

I am writing to you in my capacity as legal counsel for [Client Name]. Our client has authorized me to contact you regarding the coordination of their [Estate Planning / Tax Strategy / Asset Protection] matters with their broader financial goals.

The purpose of this introduction is to facilitate a collaborative approach between our respective offices. We believe that integrating our legal strategies with your financial management will ensure the most effective protection and growth of the client's interests.

Specifically, we would like to discuss the following items as they pertain to the client's portfolio:

- [Item 1: e.g., Funding of existing trusts]
- [Item 2: e.g., Recent changes in tax residency]
- [Item 3: e.g., Liquidity requirements for upcoming transactions]

Please note that all communications regarding this matter are to be treated with the highest level of confidentiality. A signed formal authorization/release of information from the client is [attached / available upon request].

I would like to schedule a brief introductory call to align our objectives. Please let my assistant know of your availability during the coming week.

Sincerely,

[Your Name]

[Law Firm Name]

[Phone Number]

[Email Address]

cc: [Client Name]