

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Re: Post-Settlement Financial Planning

Dear [Client Name],

Congratulations once again on the successful resolution of your legal matter. Now that your settlement has been finalized and funds are being processed, I want to ensure you have the necessary resources to manage this transition effectively.

Large legal settlements often bring complex financial considerations, including tax implications, long-term investment strategies, and estate planning. To help you navigate these areas, I am referring you to [Name of Wealth Manager/Firm].

I have worked with [Name of Professional] in the past and trust their expertise in helping clients preserve and grow their settlement proceeds. They specialize in creating customized financial roadmaps tailored to the specific needs of individuals receiving significant legal recoveries.

You can reach [Name of Professional] at:

[Wealth Management Firm Name]

[Phone Number]

[Email Address]

[Website]

While the decision to work with a financial advisor is entirely yours, I strongly recommend a consultation to ensure your recovery is protected for the future. I have taken the liberty of sharing your contact information with them, and you should expect a brief introductory call shortly.

It has been a pleasure representing you. Please do not hesitate to reach out if you have any remaining questions regarding your case.

Sincerely,

[Attorney Name]

[Law Firm Name]