[Date]

[Financial Advisor Name]
[Company Name]
[Address]
[City, State, Zip Code]

Re: Mutual Client Referral - [Client Name]

Dear [Advisor Name],

I am writing to formally introduce my client, [Client Name], who is currently in the process of developing their comprehensive estate plan with my firm.

As we finalize the legal structures, including [mention specific tools, e.g., their Revocable Living Trust and Power of Attorney], it is essential that their financial portfolio and beneficiary designations are aligned with these legal objectives. I have recommended that they consult with you to ensure their assets are properly titled and that their investment strategy complements their long-term legacy goals.

[Client Name] should be reaching out to you shortly to schedule a meeting. I have advised them that a coordinated approach between their legal counsel and financial advisor is the best way to ensure their plan is fully funded and operational.

I have attached a signed authorization from the client allowing us to share relevant documentation. Please let me know if there are specific account details or titling instructions you require from my office to facilitate this transition.

I look forward to collaborating with you to serve our client's best interests.

Sincerely,

[Your Name]
[Your Law Firm]
[Phone Number]
[Email Address]