

To: [Financial Expert Name]
[Company Name]
[Address]

Date: [Date]

Subject: Referral for Post-Divorce Asset Management - [Client Name]

Dear [Financial Expert Name],

I am writing to formally refer my client, [Client Name], to your firm for professional financial advisory and asset management services following the conclusion of their divorce proceedings.

As part of the final settlement agreement, [Client Name] has been awarded a significant portfolio of assets, including [list major assets such as cash, investment accounts, retirement funds, or real estate].

The primary objectives for this referral are:

- Consolidation and restructuring of awarded assets.
- Long-term investment strategy development based on new financial circumstances.
- Tax planning and mitigation strategies related to the settlement.
- Budgeting and cash flow management for post-divorce lifestyle.

I have advised [Client Name] to contact you directly to schedule an initial consultation. Please let me know if you require any specific documentation from our legal files to assist with your onboarding process, subject to the client's authorization.

Thank you for your expertise and for providing [Client Name] with the necessary guidance during this transition.

Sincerely,

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