

[Attorney Name]
[Law Firm Name]
[Address]
[City, State, Zip Code]
[Date]

[Beneficiary Name]
[Address]
[City, State, Zip Code]

Dear [Beneficiary Name],

Regarding the Estate of [Deceased Name], I am writing to provide a formal recommendation for your post-probate wealth management and financial planning needs.

As the legal process of settling the estate nears completion, it is essential to ensure that your inheritance is managed with long-term security in mind. I recommend that you consult with [Name of Wealth Advisor/Firm], located at [Address/Contact Info].

I have worked with this firm on several estate matters and have found them to be highly proficient in:

- Tax-efficient investment strategies for inherited assets.
- Coordinating with legal professionals to ensure alignment with your estate plan.
- Preserving capital while providing for ongoing liquidity needs.
- Comprehensive risk management and asset protection.

While my role as your probate attorney focuses on the legal distribution of assets, a qualified wealth manager will focus on the growth and preservation of those assets for your future. I suggest scheduling an initial consultation to discuss your specific financial goals.

If you have any questions regarding this recommendation or the final steps of the probate process, please do not hesitate to contact my office.

Sincerely,

[Attorney Signature]
[Attorney Name]
[Law Firm Name]