

[Attorney Name]
[Law Firm Name]
[Address]
[City, State, Zip Code]
[Phone Number]
[Email]

[Date]

[Trust Officer Name]
[Financial Institution/Trust Company Name]
[Address]
[City, State, Zip Code]

Re: Client Referral - [Client Name]

Dear [Trust Officer Last Name],

I am writing to formally introduce my client, [Client Name], who is interested in exploring professional fiduciary services. Based on our previous collaborations, I believe your expertise would be a valuable asset to their financial and estate planning goals.

[Client Name] is currently seeking assistance regarding [briefly mention specific need, e.g., corporate trustee services, investment management, or special needs trust administration]. I have suggested they speak with you to discuss how your institution can support their long-term objectives.

I have copied [Client Name] on this correspondence. I have also provided them with your contact information, and they should be reaching out to you shortly to schedule an initial consultation. Alternatively, please feel free to contact them directly at [Client Phone Number] or [Client Email].

Please keep me informed of the progress of these discussions so that we may coordinate our efforts in finalizing the client's legal and financial strategy. I look forward to working with you on this matter.

Sincerely,

[Signature]

[Typed Attorney Name]

cc: [Client Name]