

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

[Date]

[Trust Officer Name]
[Bank or Trust Company Name]
[Address]

RE: Referral of [Client Name]

Dear [Trust Officer Name],

I am writing to formally introduce my client, [Client Name], who is currently reviewing their estate planning and wealth preservation strategies. Given their significant net worth and the complexity of their multi-generational goals, I believe your expertise in corporate fiduciary services would be of great value to them.

[Client Name] is specifically interested in discussing the following:

- The advantages of appointing a corporate trustee for their irrevocable trusts.
- Sophisticated asset management and tax mitigation strategies.
- Succession planning and philanthropic goals.

I have highly recommended your services based on your firm's reputation for managing complex estates with discretion and professionalism. I have copied the client on this correspondence so that you may coordinate a preliminary meeting or introductory call.

I look forward to collaborating with you to ensure the best possible outcome for [Client Name].

Sincerely,

[Your Signature]

[Your Printed Name]
[Your Title]