

[Date]

[Recipient Name]

[Recipient Professional Title]

[Company/Firm Name]

[Street Address]

[City, State, Zip Code]

RE: Referral for Special Needs Trust Administration - [Beneficiary Name]

Dear [Recipient Name],

I am writing to formally refer the matter of [Beneficiary Name] to your office for professional Special Needs Trust (SNT) administration services. [Beneficiary Name] is a person with a disability who requires a trustee capable of managing assets while preserving eligibility for means-tested government benefits such as SSI and Medicaid.

Trust Details:

- **Type of Trust:** [First-Party SNT / Third-Party SNT]
- **Current Funding Amount:** [Approximate Dollar Amount]
- **Source of Funds:** [e.g., Personal Injury Settlement, Inheritance, Gift]
- **Current Status:** [e.g., Trust is drafted and needs funding / Trust is currently active]

Beneficiary Information:

- **Age:** [Beneficiary Age]
- **Primary Disability:** [Brief Description]
- **Current Benefits:** [e.g., SSI, SSDI, Medicaid, Section 8]

I have advised the [Grantor/Family] that your firm specializes in the complex fiduciary duties and reporting requirements associated with these trusts. Please contact [Contact Name] at [Phone Number] or [Email Address] to schedule an initial consultation or to request any further documentation needed to begin the intake process.

Thank you for your time and professional assistance with this matter.

Sincerely,

[Your Name]

[Your Title]

[Your Organization]

[Your Phone Number]