

[Your Name/Firm Name]

[Address]

[City, State, Zip Code]

[Phone Number]

[Email Address]

[Date]

[Recipient Name]

[Recipient Title/Firm]

[Address]

[City, State, Zip Code]

RE: Referral of Complex Probate Matter - Estate of [Decedent's Full Name]

Dear [Recipient Name],

I am writing to formally refer the administration of the Estate of [Decedent's Full Name] to your firm for professional fiduciary services. Due to the specialized nature of the assets and the potential for litigation, I believe your expertise is best suited for this matter.

The estate presents several complexities, including:

- [Nature of complex assets, e.g., multi-state real estate, closely held business interests]
- [Tax considerations, e.g., federal estate tax filings, generation-skipping transfers]
- [Potential conflicts, e.g., contested heirship, disputed creditor claims]
- [Liquidity issues or specialized valuation requirements]

Enclosed are the following preliminary documents for your review:

- Copy of the Last Will and Testament/Trust Agreement
- Death Certificate
- Preliminary Inventory of Assets
- Contact information for primary beneficiaries

The prospective client, [Client Name], is aware of this referral and is expecting your call to discuss the next steps and fee structure. Please let me know if you require any further information or a formal conflict check before proceeding.

Thank you for your professional assistance in this matter.

Sincerely,

[Your Signature]

[Your Printed Name]