

[Your Name]
[Your Title/Organization]
[Your Address]
[City, State, Zip Code]
[Email Address]
[Phone Number]

[Date]

[Trust Officer Name]
[Bank or Financial Institution Name]
[Address]
[City, State, Zip Code]

Re: Referral for Charitable Remainder Trust Services - [Client Name]

Dear [Trust Officer Name],

I am writing to formally refer my client, [Client Name], to you for assistance in establishing and managing a Charitable Remainder Trust (CRT). [Client Name] is interested in a philanthropic strategy that provides a predictable income stream while supporting [Organization Name] in the future.

Based on our preliminary discussions, the client is considering a [Charitable Remainder Unitrust (CRUT) / Charitable Remainder Annuity Trust (CRAT)] to be funded with [Type of Asset, e.g., appreciated securities or real estate] valued at approximately \$[Amount].

I believe your expertise in fiduciary management and trust administration would be a great asset to [Client Name] as they navigate the technical requirements of this arrangement. I have advised the client that you will be contacting them to discuss the next steps, including fee structures and administrative procedures.

Please find the client's contact information below:

Name: [Client Name]
Phone: [Client Phone Number]
Email: [Client Email Address]

I look forward to collaborating with you to help our client achieve their financial and charitable goals. Please let me know if you require any additional documentation from my office.

Sincerely,

[Your Signature]

[Your Printed Name]