

[Your Name]
[Your Title]
[Your Company]
[Date]

[Client Name]
[Client Address]
[City, State, Zip]

Dear [Client Name],

It has been a pleasure working with you to achieve your financial goals. Based on our recent discussions regarding your long-term legacy planning and the complexity of your estate, I would like to formally recommend the Wealth Management and Trust Services department at [Partner Institution Name].

I have worked closely with [Advisor Name] and their team for many years. They specialize in sophisticated wealth preservation strategies, fiduciary oversight, and personalized trust administration that align perfectly with your specific needs.

I have taken the liberty of enclosing a brochure detailing their services. With your permission, I would like to arrange a brief introductory meeting or conference call to introduce you to [Advisor Name] personally.

Please let me know if you would like me to facilitate this introduction. We remain committed to ensuring your financial future is managed with the highest level of expertise.

Best regards,

[Your Signature]
[Your Printed Name]