

[Date]

[Name of Trust Officer/Contact]

[Name of Corporate Fiduciary/Bank]

[Address]

[City, State, Zip Code]

RE: Referral for Fiduciary Services - [Client Name or Proposed Trust Name]

Dear [Name of Contact],

I am writing to formally refer my client, [Client Name], for your consideration regarding corporate fiduciary services for a proposed Asset Protection Trust (APT) to be established under the laws of [State/Jurisdiction].

The client is seeking a professional trustee to provide [select: administrative, discretionary, or directed] services. Based on our preliminary planning, the trust will likely hold the following types of assets:

- [Asset Type 1, e.g., Liquid securities]
- [Asset Type 2, e.g., LLC interests]
- [Asset Type 3, e.g., Real estate]

Enclosed/Attached is a summary of the client's background and a draft of the proposed trust instrument for your legal and compliance teams to review. My client is particularly interested in your institution's experience with [specific requirement, e.g., statutory asset protection, distribution flexibility, or specialized asset management].

Please let me know your initial requirements for the KYC (Know Your Customer) and onboarding process, as well as your current fee schedule for this type of engagement. Once you have had a chance to review the materials, I would like to schedule a brief conference call between us and the client to discuss the next steps.

I look forward to hearing from you.

Sincerely,

[Your Name]

[Your Title]

[Your Firm Name]

[Your Phone Number]

[Your Email Address]

cc: [Client Name]