

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

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

Dear [Trust Officer Name],

I am writing to formally refer my client, [Client Name], the owner of [Business Name], for your professional guidance regarding business succession planning and trust administration.

[Client Name] is currently exploring options to ensure the long-term continuity of their business while protecting their family's financial legacy. Given your expertise in managing complex fiduciary structures and multi-generational wealth transfers, I believe your services would be a vital asset in their planning process.

Specifically, we are looking to discuss:

- The integration of business assets into a formal trust structure.
- Strategies for minimizing estate tax liabilities during the transition.
- Professional trustee services to oversee the execution of the succession plan.

I have discussed this referral with [Client Name], and they are expecting a call from your office. You can reach them directly at [Client Phone Number] or [Client Email Address].

Please let me know if you require any additional documentation or background information regarding the business entity to facilitate an initial consultation.

I look forward to collaborating with you to serve [Client Name]'s best interests.

Sincerely,

[Your Signature]
[Your Printed Name]