

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

[Date]

[Recipient Name]  
[Recipient Title/Company]  
[Address]  
[City, State, Zip Code]

Subject: Referral for Revocable Living Trust Management - [Client Name]

Dear [Recipient Name],

I am writing to formally refer [Client Name] to your firm for professional assistance regarding the management and administration of their Revocable Living Trust.

[Client Name] is seeking guidance on the following matters:

- Ongoing fiduciary management of trust assets.
- Compliance with trust provisions and local regulations.
- Tax reporting and accounting requirements.
- Succession planning and distribution strategies.

I believe your expertise in trust administration aligns perfectly with [Client Name]'s current needs and financial objectives. I have advised them of your services, and they are expecting your call to schedule an initial consultation.

Please find the client's contact information below:

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

If you require any further background information or documentation regarding this referral, please do not hesitate to contact me directly.

Thank you for providing your professional care to this client.

Sincerely,

[Your Signature]

[Your Printed Name]