

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

[Date]

[Attorney Name]
[Law Firm Name]
[Address]
[City, State, Zip Code]

Re: Referral for Estate Planning Document Completion
Client Name: [Client Full Name]

Dear [Attorney Name],

I am writing to formally refer my client, [Client Full Name], to your office for the drafting and completion of their estate planning documents.

We have recently reviewed [Client Name]'s financial profile, and they are prepared to move forward with the following requirements:

- Last Will and Testament
- Revocable/Irrevocable Trust
- Durable Power of Attorney
- Healthcare Proxy / Living Will
- Other: [Specify]

I have advised the client of your expertise in this field, and they are expecting a call from your office to schedule an initial consultation. Alternatively, the client may reach out to you directly at their earliest convenience.

Please let me know if you require any specific financial data or account summaries from my side to assist in the drafting process. I look forward to working together to ensure the client's estate plan is fully executed.

Sincerely,

[Your Signature]

[Your Printed Name]