Date: [Insert Date]

[Heir Tracer Name/Agency Name]
[Address Line 1]
[Address Line 2]
[City, State, Zip Code]

RE: Formal Letter of Instruction - Heir Search for the Estate of [Deceased Full Name]

Dear [Name of Contact Person],

This letter serves as a formal instruction for your firm to identify and locate the lawful heirs or beneficiaries of the estate of [Deceased Full Name], who passed away on [Date of Death] in [Location].

1. Scope of Work
You are instructed to conduct a professional genealogical search to:

- Identify all living next-of-kin entitled to inherit under the laws of [Jurisdiction/State].
- Locate the current contact information and provide proof of identity for said individuals.
- Provide a verified family tree and a final report supported by documentary evidence (e.g., birth, marriage, and death certificates).

2. Provided Information
To assist in your search, we have enclosed the following known details:

- Last known address: [Insert Address]
- Date and Place of Birth: [Insert Details]
- Known relatives: [Insert Names, if any]

3. Fees and Expenses
It is understood that your services will be rendered based on [Select one: a fixed fee / an hourly rate / a contingency percentage] as previously discussed. Any expenses exceeding [Insert Amount] must be approved in writing by this office prior to being incurred.

4. Timeline
We require an initial progress report by [Insert Date] and the completion of the final report by [Insert Date].

5. Confidentiality
All information provided by this office and all data gathered during your investigation must remain strictly confidential and should not be disclosed to third parties without prior written consent.

Please acknowledge receipt of these instructions and your acceptance of this engagement by signing and returning the enclosed copy of this letter.

Yours sincerely,

[Your Signature]
[Your Printed Name]
[Your Title/Capacity, e.g., Executor or Attorney]
[Your Contact Information]