

[Date]

[Beneficiary Name]
[Beneficiary Address]
[City, State, Zip Code]

Re: Succession Planning for the Estate of [Name of Deceased/Grantor]

Dear [Beneficiary Name],

I am writing to formally confirm that [Law Firm/Consultant Name] has been retained by [Client Name] in their capacity as [Executor/Trustee/Planner] regarding the succession planning and administration of the above-referenced estate.

The purpose of this letter is to clarify that our firm represents [Client Name] exclusively. We do not represent you or your individual interests in this matter. While we may provide you with information or documents related to the succession process, this communication does not create an attorney-client relationship between you and this firm.

Succession planning often involves complex legal and financial decisions. Because we do not represent you, we cannot provide you with legal or tax advice. We strongly recommend that you retain your own independent legal counsel to review any documents and to ensure your interests are fully protected during this process.

Please be advised that any information you share with us is not protected by attorney-client privilege, as our duty of loyalty and confidentiality belongs solely to [Client Name].

If you have any questions regarding the administration process, please direct them to our office in writing. However, for legal advice regarding your rights as a beneficiary, please consult with your own attorney.

Sincerely,

[Your Name/Signature]
[Firm Name]

Acknowledgment:

I acknowledge that I have received and read this non-engagement letter and understand that [Law Firm/Consultant Name] does not represent me.

[Beneficiary Signature]

[Date]