

[Date]

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

**Re: Declination of Legal Representation regarding the Estate/Succession Planning of
[Client Name]**

Dear [Beneficiary Name],

I am writing to formally confirm that [Law Firm Name] represents [Client Name] in connection with their estate and succession planning matters.

While you are named as a beneficiary in these plans, please be advised that this firm represents [Client Name] exclusively. We do not represent you, and no attorney-client relationship exists between you and this firm. Our professional and ethical obligations are solely to our client.

Because our interests must remain aligned with [Client Name], we cannot provide you with legal advice, interpretation of the documents, or updates regarding the status of the plan without express authorization from our client.

We strongly recommend that you retain independent legal counsel to review these matters on your behalf and to ensure your personal interests are protected. Any action you take or fail to take in reliance upon information provided to our client is at your own risk.

Please acknowledge receipt of this letter by signing below and returning a copy to our office.

Sincerely,

[Attorney Name]
[Law Firm Name]

Acknowledgment:

I acknowledge that I have read this letter and understand that [Law Firm Name] does not represent me in this matter.

Signature: _____ Date: _____