

[Date]

[Beneficiary Name]

[Address Line 1]

[Address Line 2]

RE: Notice of Non-Engagement Regarding the Estate/Succession Planning of [Client Name]

Dear [Beneficiary Name],

This letter is to formally advise you that [Law Firm/Consultant Name] has been retained by [Client Name] solely for the purpose of succession planning and legal counsel. Our firm represents [Client Name] only.

Please be advised that we do not represent your individual interests in this matter. This communication is to confirm that no attorney-client relationship exists, or will exist, between you and this firm regarding this succession plan. Because we do not represent you, we cannot provide you with legal advice, and we recommend that you consult with your own independent legal or financial counsel to review your interests.

Our duties are owed exclusively to [Client Name], and we will act solely upon their instructions. Any information or documents shared with you during this process are for informational purposes only and do not constitute legal advice to you.

Please acknowledge receipt of this notice by signing and returning the enclosed copy of this letter.

Sincerely,

[Your Name/Signature]

[Title]

[Firm Name]

Acknowledgment

I hereby acknowledge that I have received this notice and understand that [Law Firm/Consultant Name] does not represent me in this matter.

[Beneficiary Name]

Date: _____