

[Date]

[Beneficiary Name]

[Beneficiary Address]

[City, State, Zip Code]

RE: Estate Succession Planning of [Name of Deceased/Client]

Dear [Beneficiary Name],

This letter is to formally confirm that [Law Firm/Attorney Name] has been retained by [Executor/Trustee Name] solely in their capacity as the [Executor/Trustee] of the [Estate/Trust Name].

Please be advised that we do not represent you individually in your capacity as a beneficiary. Our legal obligations and attorney-client relationship are strictly with the [Executor/Trustee]. Therefore, we cannot provide you with legal advice, and any information provided to you should be considered for informational purposes regarding the administration of the estate only.

Because our interests may differ, we strongly recommend that you seek independent legal counsel to review the proceedings, protect your specific interests, and advise you on any tax or legal implications resulting from this succession planning.

Please note that no attorney-client relationship is formed between you and this firm by virtue of our communications or your receipt of distributions from the estate.

If you have any questions regarding the status of the administration, you may contact our office; however, we again urge you to consult with your own attorney for legal guidance.

Sincerely,

[Attorney Signature]

[Attorney Name]

[Law Firm Name]