[Date]

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

Re: Estate Planning and Wealth Transfer Strategy Review

Dear [Client Name],

As your fiduciary advisors, we are writing to initiate a formal review of your estate planning and wealth transfer objectives. Our goal is to ensure that your current legal and financial structures align with your long-term legacy goals and provide for the efficient transfer of assets to your beneficiaries.

To facilitate this review, we recommend evaluating the following key areas:

- **Core Documents:** Review of your Will, Revocable Living Trust, and Powers of Attorney.
- **Asset Titling:** Ensuring accounts and property are titled correctly to avoid unnecessary probate.
- **Beneficiary Designations:** Updating primary and contingent beneficiaries on retirement accounts and insurance policies.
- **Tax Mitigation:** Analyzing gift tax, estate tax, and generation-skipping transfer tax exposure.
- **Liquidity Planning:** Ensuring sufficient cash flow for estate settlement costs and taxes.

Please provide us with copies of your existing estate documents or introduce us to your legal counsel so we may coordinate our efforts. We act in a fiduciary capacity, meaning our recommendations are strictly based on your best interests and the preservation of your family's wealth.

We would like to schedule a meeting on [Date/Time] to discuss these matters in detail. Please let us know if this time works for you.

Sincerely,

[Advisor Name]
[Firm Name]
[Contact Information]