

[Date]

[Family Member Name/Heir Name]

[Address Line 1]

[Address Line 2]

Subject: Formal Establishment of the [Family Name] Family Office and Succession Plan

Dear [Name],

I am writing to formally announce the establishment of the [Family Name] Family Office. This entity has been created to centralize the management of our family's financial assets, philanthropic endeavors, and long-term legacy.

The primary objectives of this Family Office are as follows:

- **Asset Preservation:** To protect and grow our capital through disciplined investment management.
- **Governance:** To provide a structured framework for decision-making across generations.
- **Education:** To prepare the next generation for the responsibilities of wealth stewardship.

In conjunction with this establishment, we have formalized a Wealth Succession Plan. This plan outlines the transition of leadership and the distribution of assets to ensure the continuity of our values and financial stability. You have been identified as a [Beneficiary/Successor/Stakeholder], and as such, you will play a vital role in this transition.

We have appointed [Name of Lead Advisor/Office Head] to manage the daily operations. They will be reaching out to you shortly to schedule a private briefing regarding your specific role, the legal structures in place (such as trusts or holding companies), and the timeline for implementation.

Our goal is to ensure that the [Family Name] legacy serves as a foundation for your future and the generations to come. We encourage open communication and look forward to your involvement in this new chapter.

Sincerely,

[Your Name]

[Title/Position, e.g., Family Principal]