

[Date]

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

Dear [Recipient Name],

This letter serves as a formal notification regarding the transition of family wealth and equity holdings. As part of our long-term succession planning, we are initiating a transfer of assets to ensure the preservation and growth of our family legacy.

**Details of the Transition:**

- **Asset Description:** [Description of Equity/Shares/Property]
- **Entity Name:** [Company or Trust Name]
- **Effective Date:** [Date of Transfer]
- **Ownership Percentage:** [Percentage]%

The purpose of this transfer is to involve the next generation in the stewardship of our collective resources. Along with this equity transition, you will be granted [Voting Rights/Board Seat/Beneficiary Status] as outlined in the attached legal documentation.

Please review the enclosed documents carefully. We have scheduled a meeting on [Date/Time] with our legal and financial advisors to discuss the tax implications, governance responsibilities, and any questions you may have.

We look forward to working together to manage our family's future with integrity and shared vision.

Sincerely,

[Your Name]  
[Your Title/Role, e.g., Family Trustee or Managing Member]

Enclosures: [List of attached documents]