

[Consultant Name/Firm Name]

[Address Line 1]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Date]

[Client Name]

[Family Enterprise Name]

[Address Line 1]

[City, State, Zip Code]

Dear [Client Name],

Subject: Proposal for Family Enterprise Succession Strategy Consulting

Thank you for the opportunity to outline a strategic succession framework for [Family Enterprise Name]. We understand that transitioning leadership and ownership within a family business requires a delicate balance between commercial sustainability and family harmony.

Our consulting engagement will focus on the following core pillars:

- **Successor Identification and Development:** Assessing internal candidates and creating professional development roadmaps.
- **Governance Framework:** Establishing a Family Council and formalizing decision-making protocols.
- **Strategic Continuity:** Aligning the long-term business vision with the transition timeline.
- **Legal and Financial Transition:** Coordinating with your legal and tax advisors to ensure a structured transfer of equity.

The objective is to ensure that the legacy of [Family Enterprise Name] remains robust while empowering the next generation of leadership to innovate and grow.

We propose an initial discovery phase beginning on [Start Date]. Attached to this letter is a detailed timeline and fee structure for your review.

We look forward to partnering with your family to secure the future of your enterprise.

Sincerely,

[Signature]

[Consultant Name]

[Title]