

# Letter of Estate Planning Strategy Adjustment

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Recipient's Name]

[Recipient's Title/Relationship]

[Recipient's Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I hope this letter finds you well. I am writing to inform you of some adjustments I am making to my estate planning strategy, in light of recent changes in my personal circumstances and financial portfolio.

After careful consideration and consultation with my legal and financial advisors, I have decided to [briefly outline the changes, e.g., update my will, adjust trust beneficiary designations, etc.].

These adjustments aim to better reflect my current wishes and ensure that my assets are distributed according to my intentions. I believe these changes will provide more clarity and benefit to my beneficiaries.

I recommend a meeting to discuss these changes in further detail and to answer any questions you may have. Please let me know your available times, and I will do my best to accommodate.

Thank you for your understanding and support as I make these important adjustments to my estate plan.

Sincerely,

[Your Name]