

Estate Tax Planning Assessment Inquiry

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Your Email]

[Your Phone Number]

[Recipient's Name]

[Recipient's Title]

[Company/Organization Name]

[Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I hope this message finds you well. I am reaching out to inquire about setting up an estate tax planning assessment. Given the complexities associated with estate taxes and the importance of ensuring that my estate is managed effectively, I would like to understand the options available to me.

Could you please provide me with information regarding your services and any initial steps I should take to begin this process? Additionally, I would appreciate it if we could schedule a consultation at your earliest convenience to discuss my specific circumstances in detail.

Thank you for your attention to this matter. I look forward to your prompt response.

Sincerely,

[Your Name]