

Estate Tax Planning Assistance Application

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Your Email]

[Your Phone Number]

[Recipient Name]

[Recipient Title]

[Company/Organization Name]

[Company Address]

[City, State, Zip Code]

Dear [Recipient Name],

I am writing to formally request assistance with estate tax planning for my estate. As I navigate the complexities of estate management, I recognize the importance of effective tax planning to ensure my assets are managed in accordance with my wishes and to minimize the tax burden on my beneficiaries.

Due to [briefly explain your situation or reason for seeking assistance, e.g., recent changes in assets, family structure, etc.], I would greatly appreciate your guidance on the following matters:

- [List specific areas where assistance is needed, e.g., trust formation, gift strategies, etc.]
- [Area of interest 2]
- [Area of interest 3]

Thank you for considering my application. I look forward to your favorable response and advice on how to proceed with my estate tax planning. Should you require any further information, please feel free to contact me at your convenience.

Sincerely,

[Your Name]