

# Estate Tax Planning Evaluation Request

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Your Email Address]

[Your Phone Number]

[Recipient's Name]

[Recipient's Title]

[Company/Organization Name]

[Company Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I hope this letter finds you well. I am reaching out to request an evaluation of my current estate tax planning strategy. As I navigate my financial planning, I want to ensure that my estate is managed effectively and in accordance with the current tax laws.

Specifically, I would like to discuss the following points:

- Assessment of my current estate plan
- Potential tax implications of my estate
- Strategies for minimizing estate taxes

I appreciate your attention to this matter and would like to schedule a meeting at your earliest convenience. Please let me know your availability for a discussion.

Thank you for your assistance.

Sincerely,

[Your Name]