

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Recipient's Name]

[Recipient's Title]

[Company Name]

[Company Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I hope this message finds you well. I am reaching out to request a review of my current estate tax planning strategies. As personal and financial circumstances can change over time, I believe it is essential to reassess my existing plans to ensure they align with my current goals and comply with the latest tax laws.

I would appreciate your expertise in identifying any necessary adjustments or recommendations for optimizing my estate plan. Please let me know your availability for a meeting to discuss this matter further.

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

Sincerely,

[Your Name]