

Estate Planning Review and Update

Date: [Insert Date]

Dear [Client's Name],

I hope this letter finds you well. As part of our commitment to providing you with comprehensive estate planning services, I would like to schedule a review and update of your current estate plan. It is important to ensure that your plan continues to reflect your wishes and meets your current needs.

During our review, we will discuss:

- Any changes in your personal circumstances (e.g., marriage, divorce, births, deaths)
- Updates in state and federal laws that may affect your estate plan
- Modifications to your assets or financial situation
- Your current wishes regarding beneficiaries and guardianship

Please let me know your availability for a meeting over the next few weeks. I look forward to assisting you with your estate planning needs.

Thank you for your continued trust in our services.

Sincerely,

[Your Name]

[Your Title]

[Your Company]

[Your Contact Information]