

Estate Planning Consultation

Date: [Insert Date]

To: [Client's Name]
[Client's Address]
[City, State, Zip Code]

Dear [Client's Name],

Thank you for reaching out regarding your estate planning needs. I appreciate the opportunity to assist you with establishing a secure and comprehensive plan for your assets and loved ones.

After our recent discussion, I would like to outline some key points regarding trusts and wills:

Wills

A will serves as a legal document to dictate how your assets will be distributed after your passing. It allows you to appoint an executor to manage your estate and provides guidance for guardianship of minor children.

Trusts

Establishing a trust can provide additional benefits, including avoiding probate and offering greater privacy. A trust can be structured to meet your specific needs and objectives, ensuring your assets are managed according to your wishes.

Next steps include:

- Gathering documentation regarding your assets and liabilities.
- Determining your beneficiaries and any specific bequests you wish to make.
- Scheduling a follow-up meeting to draft the necessary documents.

Please feel free to reach out if you have any questions or require further clarification on any points. I look forward to assisting you in creating a solid estate plan.

Sincerely,

[Your Name]
[Your Title]
[Your Company]
[Your Contact Information]