

Inheritance Planning Consultation Request

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Date]

[Recipient Name]

[Recipient Title]

[Company Name]

[Company Address]

[City, State, Zip Code]

Dear [Recipient Name],

I hope this message finds you well. I am writing to request a consultation regarding inheritance planning. As I consider my financial future and that of my beneficiaries, I believe it is essential to seek professional guidance to effectively navigate this process.

I would appreciate the opportunity to discuss my current situation and explore the best strategies to ensure a smooth transition of my assets. Please let me know your availability for a meeting, either in-person or virtually, at your earliest convenience.

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

Sincerely,

[Your Signature (if sending a hard copy)]

[Your Printed Name]