

Legacy Planning Inquiry

Date: [Insert Date]

To: [Recipient's Name]

[Recipient's Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I hope this message finds you well. I am reaching out to inquire about legacy planning services that you may offer. I am interested in understanding how I can best manage my assets and ensure my wishes are honored in the event of my passing.

Specifically, I would like to know more about the following:

- Options for wills and trusts
- Tax implications of legacy planning
- Strategies for charitable giving
- Power of attorney and healthcare directives

I would appreciate any information you can provide and would be grateful to schedule a consultation to discuss this further. Please let me know your availability in the coming weeks.

Thank you for your assistance. I look forward to your reply.

Sincerely,

[Your Name]

[Your Address]

[City, State, Zip Code]

[Your Phone Number]

[Your Email Address]