

Estate Tax Exemption Utilization Letter

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Recipient Name]

[Recipient Address]

[City, State, Zip Code]

Dear [Recipient Name],

I hope this letter finds you well. I am writing to formally notify you of the intention to utilize the estate tax exemption as permitted under current federal and state laws.

As of [insert relevant dates], the applicable exemption amount stands at [insert exemption amount]. With this letter, I intend to indicate the assets and adjustments that will be made to capitalize on this exemption effectively.

Enclosed, please find the necessary documentation that outlines the assets included in the estate and the strategies for maximizing the estate tax exemption. Please review the attached items at your earliest convenience.

If you have any questions or require additional details, please feel free to contact me at [your phone number] or [your email address].

Thank you for your attention to this matter.

Sincerely,

[Your Name]

[Your Title/Relationship, if applicable]