

Life Insurance Estate Tax Liquidity Letter

Date: [Insert Date]

[Recipient's Name]

[Recipient's Address]

[City, State, ZIP Code]

Dear [Recipient's Name],

As part of my ongoing efforts to ensure the financial stability of my estate and to provide liquidity for any potential estate taxes, I would like to discuss the inclusion of a life insurance policy in my financial planning.

Life insurance can play a crucial role in providing the necessary funds to cover estate taxes, thereby preventing the need to liquidate other assets at unfavorable times. After evaluating various options, I believe that securing a policy with a reputable insurer will aid significantly in this regard.

I would appreciate the opportunity to review my current financial status and discuss suitable life insurance options with you, including policy types, coverage amounts, and premium payments. My goal is to ensure that my beneficiaries are not burdened with financial obligations and can manage the estate efficiently.

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

Sincerely,

[Your Name]

[Your Address]

[City, State, ZIP Code]

[Your Phone Number]

[Your Email Address]