

Estate Planning Needs Assessment Request

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Your Email]

[Your Phone Number]

[Recipient's Name]

[Recipient's Title/Organization]

[Recipient's Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I hope this message finds you well. I am writing to request a comprehensive needs assessment regarding estate planning services. As I am considering the future of my estate and the well-being of my loved ones, I believe it is essential to engage in a detailed discussion about my options.

Please let me know your available times for a consultation, either in person or via a phone call. I am looking forward to understanding the strategies that can be implemented to ensure that my estate is managed according to my wishes.

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

Sincerely,

[Your Name]