

Estate Planning Letter for Refinancing Properties

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Recipient's Name]

[Recipient's Title]

[Company Name]

[Company Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I am writing to formally discuss the estate planning considerations for refinancing my properties located at [Property Address 1] and [Property Address 2]. It is my intention to ensure that these properties are managed in alignment with my overall estate plan.

As I consider refinancing options, I would like to outline my goals, which include:

- Reducing monthly mortgage payments
- Accessing equity for other investment opportunities
- Ensuring that the properties remain in my estate and are easily transferable to my heirs

Additionally, I am keen to understand how this refinancing might affect my current estate plan and what measures can be taken to safeguard my assets.

Please let me know a suitable time for us to discuss this matter further. I appreciate your guidance and expertise as I navigate through this process.

Thank you for your attention to this important matter.

Sincerely,

[Your Name]