

_____, 20__

Via Email and Regular Mail

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Re: Collaboration

Dear Advisors:

I/We have recently hired _____ to assist me/us with my/our estate planning. I/We understand the benefits of collaboration and request that you communicate and collaborate as reasonably necessary with Mr. _____ and his office, and with each other, in order to increase the coordination and efficiency of my/our planning. This might include copying some or all advisers on emails, letters or memorandum, or participating in a phone or web conference with other advisers.

While I/we leave to each of your reasonable discretions what steps should be taken, I/we request that you be cognizant of the additional costs that this might create and that if additional work becomes advisable you let me/us know in advance. I/We also would appreciate your collaboration minimizing any duplication of work so that as a group you should endeavor to select which of you will handle which aspects of a particular matter.

If you require any additional documentation for me/us to authorize this collaboration, please let me/us know, otherwise accept this as my/our authorization.

Sincerely,

Name: _____

Name: _____

Cc: _____