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\_\_\_\_\_, 20\_\_

**Via Email and Regular Mail**

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**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: \_\_\_\_\_