*[Date]*

*[Client Name]*

*[Address]*

Re: Draft Estate Planning Documents

Dear *[Client Name]:*

I have enclosed the following draft estate planning documents for your review:

1. *[List each draft document enclosed in the letter.]*

*[Provide a summary of each document and the purpose of the document.]*

I look forward to discussing your questions about the documents on \_\_\_\_\_\_\_\_\_\_\_\_ at \_\_\_\_\_\_\_ over the telephone. I will initiate the telephone call. If we need to make any revisions, I will provide you with a revised draft to review prior to signing the documents.

Warm Regards,

*[Attorney]*

*[Firm]*

Enclosures

**IMPORTANT NOTICES**

This material is provided for informational purposes only and does not establish, report, or create the standard of care for attorneys in Oregon, nor does it represent a complete analysis of the topics presented. Readers should conduct their own appropriate legal research. The information presented does not represent legal advice.  This information may not be republished, sold, or used in any other form without the written consent of the Oregon State Bar Professional Liability Fund except that permission is granted for Oregon lawyers to use and modify these materials for use in their own practices. © 2023 OSB Professional Liability Fund