

[CPA/ATTORNEY COMPANY NAME]

[CPA/ATTORNEY COMPANY ADDRESS]

[CPA/ATTORNEY NAME]

[CPA/ATTORNEY PHONE NUMBER]

[CPA/ATTORNEY EMAIL]

[CPA/ATTORNEY WEBSITE]

[DATE]

To Whom It May Concern,

Please be advised that I represent [Client Name] with regards to trust and estate planning and am familiar with their financial condition. I believe that the attached financial statement fairly presents his financial condition as of [Month & Year]. To my knowledge, no events have occurred subsequent to the statement date, which will materially change his financial condition as presented.

Best,

[CPA/ATTORNEY PRINTED NAME]

[Client Name]

Statement of Financial Condition

[Month & Year]

ASSETS

Cash \$[AMOUNT]

Marketable Securities **\$[AMOUNT]**

Receivables \$[AMOUNT]

Business Equity **\$[AMOUNT]**

Life Insurance Cash Value **\$[AMOUNT]**

Real Estate **\$[AMOUNT]**

TOTAL ASSETS **\$[AMOUNT]**

LIABILITIES

Mortgages \$[AMOUNT]**TOTAL LIABILITIES** **\$[AMOUNT]**

NET WORTH **\$[AMOUNT]**