



NAEPC

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***CLIENTNAME**
***CLIENTADDRESS**

*DATE

Via Email PDF

Martin M. Shenkman, Esq.
Shenkman Law
P.O. Box 1130
Fort Lee, NJ 07024

*FINANCIALPLANNER-NAME
*FINANCIALPLANNER-ADDRESS

*INSURANCEAGENT-NAME
*INSURANCEAGENT-ADDRESS

*CPA-NAME
*CPA-ADDRESS

Re: Collaboration

Dear Advisors:

I #We have recently hired Martin M. Shenkman, PC to assist #me #us with #our estate planning. #I #We understand the benefits of collaboration and request that you communicate and collaborate as reasonably necessary with Mr. Shenkman 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,

*CLIENTNAME

#_____
*CLIENTNAME

Cc: Martin M. Shenkman, PC