

4.6 h. CLOSING LETTER

Dear (Name):

I wish to take this opportunity to thank you for allowing me to represent you in the (describe) matter. In order to complete this matter, I will (outline any final matters you will take care of). In addition, you will need to (outline everything the client is responsible for at this time).

[For dissolution of marriage cases, add the following: I again remind you to immediately make any beneficiary changes on your insurance and/or retirement plan benefits should you desire to do so. If your former spouse remains designated as a beneficiary, it is likely that (s)he will get the proceeds of such assets unless you designate a different beneficiary and sign the necessary forms to complete the transaction.]

Because this matter is now closed, I suggest that you keep all information relating to the matter in a safe place where you can easily locate it. I am closing my file and I am returning your original (records, documents) related to your case. As we discussed in our initial interview, my firm will store your file for (number of years) years from now. The file will then be destroyed unless you request that we store the file for a longer period of time. If you wish me to store the file for a longer period of time, you must instruct me to do so in writing within five days of the date of this letter.

We hope this matter has been concluded to your satisfaction. Thank you for allowing us to represent you in this matter. If we can be of further assistance on this or any matter, please let us know.

Very truly yours,

(Your name)