**Settlement Letter Template**

<Client name and address block>

Hello <first name>,

It was a pleasure working with you on your recent real estate transaction. Attached please find a copy of the [settlement statement or closing disclosure] for your recent home [purchase or sale]. If you haven’t received a copy already, please keep one for your permanent records and provide one to your CPA or tax professional in the upcoming tax season.

[I appreciate your recent real estate referral. Thank you for putting your trust in me.] or [If you know of anyone needing real estate services, please pass along my name and number.]

Best Wishes,

<first name>

<Contact block with name

RE license #

firm name

firm address

Disclaimer: This document is provided as a sample and does not constitute legal advice. Members should modify this document to address their specific needs and verify all information provided to ensure its accuracy and compliance with applicable law.