

## **Transmittal to Client**

Use transmittal forms like this to send documents to clients without creating a customized letter each time.

Set up the form on your firm letterhead. Use form fields in your word processing program to make the form “fillable,” or use any version of Adobe Acrobat 9. Click on Forms, Create New Form...and follow the steps in the Adobe Forms Wizard. Use Acrobat to add “Submit by Email” or “Print Form” buttons which allow you to easily send the transmittal to the client by e-mail or U.S. Postal mail. Retain a copy of the transmittal in your electronic and/or paper file.

**ANY FIRM PC**

ABC Place, Suite 300  
100 First Avenue  
Anywhere, Oregon 97204  
Telephone (503) 111-1111

**TRANSMITTAL MEMO**

TO: \_\_\_\_\_ DATE: \_\_\_\_\_

FR: \_\_\_\_\_ RE: \_\_\_\_\_

CLIENT NAME/MATTER: \_\_\_\_\_

ATTACHMENT: \_\_\_\_\_

- URGENT
- PLEASE REVIEW
- PLEASE CALL

- FOR YOUR INFORMATION
- NO REPLY NECESSARY

COMMENTS:

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