

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Subject: Retirement Announcement for [Employee Name]

Dear [Client Name],

I am writing to share some important news regarding your service team at [Firm Name]. After [Number] years of dedicated service, [Employee Name] has announced their decision to retire, effective [Retirement Date].

While we will miss [Employee Name]'s expertise and presence in the office, we are excited for them as they embark on this next chapter of their life.

Please be assured that this transition will not disrupt the management of your accounts. Your new primary point of contact will be [New Contact Name], who has been with our firm for [Number] years and brings extensive experience in [Specialty]. [Employee Name] and [New Contact Name] are working closely together over the coming weeks to ensure a seamless handoff of all your financial matters.

We would like to invite you to a brief meeting or introductory call with [New Contact Name] to answer any questions you may have. You can reach them directly at [Phone Number] or [Email Address].

Thank you for your continued trust in [Firm Name]. We look forward to continuing our partnership and helping you reach your financial goals.

Sincerely,

[Your Name]

[Your Title]

[Firm Name]