

Date: [Insert Date]

[Financial Institution Name]

[Department Name]

[Address]

[City, State, Zip Code]

RE: Notice of Intent to Liquidate Out-of-State Portfolio Assets

To Whom It May Concern,

Please accept this letter as formal authorization to liquidate the following assets held in my account(s) for the 2024 year-end closing. I have decided to divest from these out-of-state holdings for tax planning and portfolio rebalancing purposes.

Account Information:

- **Account Name:** [Account Holder Name]
- **Account Number:** [Account Number]
- **Portfolio Region/State:** [State Name]

Liquidation Details:

I request the full liquidation of the following positions:

- [Asset Name/Ticker 1] - [Number of Shares or "All"]
- [Asset Name/Ticker 2] - [Number of Shares or "All"]
- [Asset Name/Ticker 3] - [Number of Shares or "All"]

Instructions for Proceeds:

Upon the settlement of these trades, please transfer the net proceeds to:

- **Destination Account:** [Account Number or Bank Name]
- **Method:** [Check / Wire / ACH / Internal Transfer]

Please ensure all transactions are executed before the market close on December [Date], 2024, to ensure the realization of gains/losses within the current tax year. Please provide a confirmation of these trades via [Email/Mail].

Thank you for your prompt attention to this matter.

Sincerely,

[Your Signature]

[Your Printed Name]

[Your Phone Number]
[Your Email Address]