[Your Name]
[Your Address]
[City, State, Zip Code]
[Date]

[Recipient Name]
[Recipient Address/Company]
[City, State, Zip Code]

Subject: Transition of Financial Management

Dear [Recipient Name],

I am writing to share an update regarding the management of my finances. I have decided to transition the oversight and handling of my accounts to [Name of New Advisor/System/Self-Management] effective [Date].

Please know that this decision is based on my current personal goals and the need for a simplified approach that aligns with my long-term plans. I appreciate the time and effort you have invested in my financial journey up to this point.

To ensure a smooth transition, I request the following:

- A final summary of all active accounts and balances.
- Copies of any pending documentation or tax records for the current year.
- The closure or transfer of the following accounts: [List Account Numbers].

My goal is to complete this process with transparency and mutual respect. I would like to conclude our professional relationship on positive terms, focusing solely on the administrative steps required to finalize this change.

Thank you for your cooperation and for respecting my decision. Please let me know if there are specific forms I need to sign to complete this request.

Sincerely,

[Your Signature]
[Your Printed Name]