

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Subject: Notice of Retirement and Account Reassignment

Dear [Client Name],

I am writing to formally announce my retirement from [Company Name], effective [Last Working Date]. It has been a sincere privilege serving as your financial broker and assisting you with your investment goals over the years.

To ensure your financial needs continue to be met without interruption, your account(s) will be reassigned to [New Broker Name], who will be taking over my professional responsibilities. [New Broker Name] has extensive experience in the industry and I am confident in their ability to provide you with the high level of service you expect.

Your New Point of Contact:

- **Name:** [New Broker Name]
- **Phone:** [New Broker Phone Number]
- **Email:** [New Broker Email Address]

There is no action required on your part at this time. Your account numbers, fee structures, and existing investments remain unchanged. [New Broker Name] will be reaching out to you shortly to introduce themselves and schedule a brief introductory meeting.

If you have any immediate questions before my departure, please do not hesitate to contact me at [Current Broker Phone/Email].

Thank you for the trust you have placed in me. I wish you continued success in all your future endeavors.

Sincerely,

[Your Signature]

[Your Printed Name]

[Your Title]