

head>

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Subject: Important Information Regarding Your Account

Dear [Client Name],

I am writing to formally inform you that I will be leaving [Current Brokerage Name], effective [Last Date]. It has been a pleasure working with you to manage your financial goals.

Please be assured that your accounts remain secure. To ensure you continue to receive uninterrupted service, your account(s) will be transferred to [New Agent Name], who is a highly experienced professional at our firm. [New Agent Name] will be reaching out to you shortly to introduce themselves and discuss your ongoing investment strategy.

Your current account numbers and login credentials will remain the same. No immediate action is required on your part during this transition.

If you have any questions regarding this change, you may contact the office at [Office Phone Number] or email [Office Email Address].

Thank you for your continued trust and for the opportunity to have served as your agent.

Sincerely,

[Departing Agent Name]

[Title]

[Current Brokerage Name]