

[Date]

[Recipient Name]

[Recipient Address]

[City, State, Zip Code]

RE: Notice Regarding Excluded Assets and Transfer of Client Files

Dear [Recipient Name],

This letter serves as formal notification regarding the treatment of specific assets and client files in connection with the [Transaction Name/Agreement] dated [Date].

1. Excluded Assets

Please be advised that the following assets are expressly excluded from the aforementioned transaction and shall remain the sole property of [Seller/Entity Name]:

- [Item 1: e.g., Proprietary Software]
- [Item 2: e.g., Intellectual Property/Trademarks]
- [Item 3: e.g., Specific Cash Accounts]
- [Item 4: e.g., Personal Equipment]

2. Client Files and Data

Regarding the transfer of client files, the following protocols shall apply:

- **Transferred Files:** All active client files listed in [Schedule A] will be transferred to [Buyer Name] effective [Date].
- **Excluded Files:** Files relating to [Specific Clients/Closed Matters] are excluded from this transfer and will be retained or destroyed by [Seller Name] in accordance with applicable data retention policies.
- **Confidentiality:** Both parties agree to maintain the confidentiality of all client data during the transition period.

3. Delivery and Access

The physical and digital delivery of the included files will take place via [Method of Delivery] on or before [Deadline Date]. Access to excluded assets by the recipient is strictly prohibited unless authorized in writing.

Please acknowledge receipt of this notice by signing below.

Sincerely,

[Your Name/Authorized Signature]

[Your Title]

Acknowledgment:

[Recipient Name/Representative]

Date: _____