[Client Name]

[Street Address]

[City, State Zip]

[Date]

[Prior Firm Name]

[Street Address]

[City, State Zip]

To Whom It May Concern:

Please use this letter as authorization to release information concerning my accounts to [Advisor Name] with [Advisor Company]. I intend to transfer the accounts to [Advisor Custodian]. Please send me copies of my most recent statements.

Thank you.

Sincerely,

[Client Name]