[Advisor Name]

[Firm Name]

[Street Address]

[City, State Zip]

[Date]

[Client Name]

[Street Address]

[City, State Zip]

[Salutation],

It is with great excitement that I announce the launch of my new firm, [Firm Name]. [Firm Name] is an independent registered investment advisor that I established to better serve you.

My new contact information is:

[Firm Name]

[Street Address]

[City, State Zip]

[Phone Number]

[Website URL]

[Email Address]

In order for me to continue serving you, please follow the instructions provided for completing the enclosed paperwork. I’ve chosen [Custodian Name] as my preferred provider and will be transferring your accounts upon receipt of this paperwork.

Please let me know if you have any questions about the process or the logic behind my decision. As always, I will continue to provide the same level of service I always have, and I look forward to doing so.

Sincerely,

[Advisor Name]