**Client Letter Template |   
Associate Wealth Advisor Departure**

*Always include appropriate BD/RIA disclosures and submit template letters for compliance review and approval before using.*

**{Client Name}  
{Client Address}  
{Client City, State, Zip}**

**{Date}**

At **{Company Name},** we are committed to offering you the high level of service you deserve. With that goal in mind, we would like to inform you of a change regarding the servicing of your account.

**{Name of Departing AWA}** is no longer with our firm, but our goal is to ensure the monitoring and servicing of your account is not disrupted in any way. For this reason**, {Senior Advisor’s Name}** will continue to manage your account until we add a new primary point-of-contact advisor to assist with your wealth management. Feel free to call us at **{Phone Number(s)}** with any additional questions regarding your account or if you wish to place a trade.

We would like to take this opportunity to express our appreciation for your business, and we look forward to continuing to serve your financial and investment needs.

**{Advisor Name}**

**{Advisor Title}**