**Client Letter Template |
Fire Client – Not a Good Fit**

*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}**

Dear **{Client First Name},**

During a recent review of my clients, I’ve come to realize that our relationship does not seem to be a good match. While I greatly appreciate your past business, my firm has taken a different direction over the years and I do not feel I am able to adequately serve you any longer.

At this point, I believe it would be best for you to seek out another financial advisor who can better meet your needs. There are several qualified financial advisors in our local area, many of which specialize in financial situations similar to yours.

I have requested to be removed as advisor of record from all of your accounts, which should be completed within the next week. If you have any questions before you are able to transfer your accounts to a new advisor, please contact **{Sponsor Company/Custodian Name}** directly.

I wish you the best of luck in your future endeavors.

Sincerely,

**{Advisor Name}**

**{Advisor Title}**

Enclosures