**Client Letter Template |
Fire Client – Rude to Team**

*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},**

I pride myself in delivering exceptional service to my clients in a professional and respectful manner. As a matter of principle, I expect my clients to show my team a mutual level of respect in return. Your most recent interactions with my office have violated this basic principle and have led me to conclude that our values do not align.

Although I appreciate your past business, I simply cannot tolerate my clients treating me or my team with disrespect. I must ask that you find a new advisor who can better meet your needs.

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.

Regards,

**{Advisor Name}**

**{Advisor Title}**