**Client Letter Template |   
Fire Client - Unresponsive**

*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 know you have been a client of mine for quite some time now, but over the past several years, my office has been unsuccessful in scheduling an annual review of your accounts. If we aren’t able to connect at least annually to review your portfolio, I cannot fulfill my duties as your financial advisor.

Therefore, I am asking that you please seek the assistance of another financial advisor. There are many in our local area I am sure would be happy to assist you.

Enclosed you will find forms which require your authorization to remove **{Insert Broker/ Dealer Name}** as your Broker/Dealer and me as your representative of record from your accounts held with **{Insert Sponsor Name(s**)}. Please return those to me at your earliest possible convenience.

If you have any questions regarding this request, please feel free to call **{Insert Team Member’s Name}** at **{Insert Team Member’s phone number}**.

Sincerely,

**{Advisor Name}**

**{Advisor Title}**

Enclosures