CARSON
COACHING

Wealth Advisor Departure Letter Template

[Insert Date]

[Insert Client Name(s) & Address]

Dear [Insert Client Name(s)],

At [Firm Name], we are committed to offering you the high level of service you deserve along with access to financial services and investment strategies to help meet all your financial needs. With that goal in mind, we would like to inform you of a change regarding the servicing of your account.

[Name of Departing Wealth Advisor] is no longer with our firm, but our goal is to ensure the monitoring of your financial plan and servicing of your account is not disrupted in any way. For this reason, [Senior Advisor] will continue to manage your plan and account until paperwork is completed to add [New Advisor] to your accounts as co-manager with [Senior Advisor]. Feel free to call us at [Insert Phone Number(s)] with any additional questions regarding your account.

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. [If paperwork requires client signatures, add: Please authorize the enclosed forms and return them in the envelope provided as soon as possible.] [If no signatures are required from the client, add: No action is needed from you at this time. [Firm Name], our team, and [Senior Advisor] are all available to answer any questions you may have.]

Sincerely,

[Senior Advisor/Firm Owner Name]

[Title]

[Insert B/D name and disclosure(s)]