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

*Must be used with your Advertising Review Team approved letterhead or email signature.*

LPL Compliance Approval # 1-05025876

The attached has been given an 'Approved As Is' status by the Advertising Review Team. Advisors who are interested in using and/or customizing pre-approved materials should ensure an understanding of the **Pre-Approved Communications** section of the **Advisor Compliance Manual** posted on ClientWorks. This section of the compliance manual includes instructions on how to use pre-approved materials and meet the necessary Books and Records requirements.

 **{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 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 professional who can better meet your needs. There are several qualified financial professionals in our local area, many of which specialize in financial situations similar to yours.

I have requested to be removed as financial professional 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 financial professional, please contact **{Sponsor Company/Custodian Name}** directly.

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

Sincerely,

**{Advisor Name}**

**{Advisor Title}**