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

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

LPL Compliance Approval # 1-05025879

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},**

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 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 you find a new financial professional who can better meet your needs.

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.

Regards,

**{Advisor Name}**

**{Advisor Title}**