

Note: This is a read-only copy. You can copy the text below, but you are unable to edit it on this document.

More Services

Dear [Financial Advisor's name],

I hope you are well. I'm writing to you today to let you know that I've decided to work with a new financial advisor.

I want to start by thanking you for all of your help over the years. You've been a valuable asset to us and we'll be forever grateful for your guidance and expertise.

As you know, we're approaching retirement. This is a big change for us, and we're looking for a financial advisor who can provide more comprehensive services that meet our needs as we shift from our accumulation phase into retirement. I'm specifically looking for an advisor who can help us with:

- Tax strategies: I want to make sure that we're minimizing our lifetime tax payments through a coordinated tax strategy.
- Efficient spending strategies: We want to make sure that we're drawing down our portfolio in a way that maximizes our retirement income.
- Overall financial review to ensure we feel 100% confident in our retirement decisions.

We've done a lot of research, and we've engaged new financial advisors who we've found to be a good fit for us. They will be initiating transfer from [insert your financial institution] to complete this process.

Again, thank you for all of your help over the years. We wish you all the best in the future.

Team Longevity

Dear [Financial Advisor's name],

I'm writing to you today to let you know that we've decided to change financial advisors. I know this may come as a surprise, but we've given it a lot of thought, and we believe it's the best decision for us at this time.

We want to start by thanking you for all of your help over the years. You've been a valuable asset to us and we have nothing but gratitude for your guidance and expertise.

As you know, we are retiring soon. We've decided that we want to work with a financial advisor who is younger than us so that we don't have to make the decision to change advisors later in life when you decide to retire.

We've done a lot of research, and we've engaged new financial advisors who we've found to be a good fit for us. They are in contact with [insert financial institution here] to make the necessary changes on our accounts.

Again, thank you for all of your help over the years. We wish you all the best in the future.

Sincerely,