Client Realignment Letter - Related Advisor

*Use this Transfer Letter for clients being realigned to another Financial Advisor on your team.*

Date

Name

Address

Address

Address

Dear [Client Salutation]:

Recently, we have made some changes to our practice as it relates to our overall approach to financial planning and wealth management. These changes mean we will be able to better serve our clients and deliver more personalized financial guidance, advice and solutions.

We have carefully reviewed all of our clients based on their investment and financial planning needs to ensure they are aligned appropriately with a financial professional within our practice.

After careful consideration, we feel you will be better served by [Financial Advisor], a Financial Advisor in our practice. We’ve included a copy of our Introduction Package including an update on our team and more information about [Financial Advisor’s].

[Financial Advisor] is looking forward to working with you and is committed to proactively helping you achieve your financial and lifestyle goals. He/She will be calling you shortly to introduce himself/herself, set up an appointment to meet with you and discuss any questions that you may have.

I would like to thank you for your trust and confidence over the years and know that [Financial Advisor] will do a great job in meeting your future investment and financial planning needs.

Yours truly,

[Your Name]

[Your Title]

Encl.