

[Your Name]
[Your New Address]
[City, State, Zip Code]
[Your Phone Number]
[Your Email Address]

[Date]

[Wealth Manager's Name or Account Officer]
[Financial Institution Name]
[Branch Address]
[City, State, Zip Code]

RE: Account Closure Notice for Account Number(s): [Insert Account Number(s)]

Dear [Name of Wealth Manager],

Please accept this letter as formal notification to close my wealth management account(s) listed above, effective [Date]. This decision follows my recent domestic relocation to [City, State].

I request that you liquidate any remaining holdings as previously discussed and transfer the total balance, including all accrued interest and dividends, via [Wire Transfer / Check] to the following destination:

Bank Name: [New Bank Name]
Account Holder Name: [Your Name]
Routing Number: [Routing Number]
Account Number: [Account Number]

Please send all final closing statements, tax documents, and confirmation of this closure to my new address provided at the top of this letter. If there are any forms required to finalize this process, please send them to me immediately via email.

Thank you for your professional assistance during our time working together. I look forward to receiving confirmation that these accounts have been settled.

Sincerely,

[Your Signature]

[Your Printed Name]