

[Your Name]
[Your Current Address]
[Your Phone Number]
[Your Email Address]

[Date]

[Name of Wealth Manager/Advisor]
[Name of Financial Institution]
[Institution Address]

Subject: Closure of Wealth Management Account(s)

Dear [Name of Wealth Manager],

Please accept this letter as formal notification to close my wealth management account(s) held with [Name of Institution], effective [Date].

The reason for this closure is my permanent international relocation to [Country Name]. Due to this move, I will no longer require your local management services.

Regarding the assets in my account(s) (Account Number: [Your Account Number]), I request the following action:

[Option A: Liquidate all holdings and wire the total balance to the bank details provided below.]

[Option B: Transfer all eligible securities and cash to my new brokerage account at [New Institution Name], Account Number [New Account Number].]

My new contact information for future correspondence is:

[New International Address]
[New International Phone Number]

Please confirm receipt of this request and provide a final statement once the closure is complete. Thank you for your assistance over the years.

Sincerely,

[Your Signature]

[Your Printed Name]