

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

[Date]

[Name of Financial Advisor or Firm Representative]
[Name of Investment Firm]
[Firm Address]
[City, State, Zip Code]

Subject: Formal Notice of Account Closure - Account Number: [Your Account Number]

Dear [Advisor Name or Customer Service Department],

Please accept this letter as a formal instruction to close my investment account(s) referenced above, effective immediately.

I have decided to terminate our professional relationship due to what I consider negligent advisory services. Specifically, I am dissatisfied with [mention brief reason, e.g., the lack of communication, failure to follow investment objectives, or unsuitable recommendations] which has resulted in an unsatisfactory management of my portfolio.

I request that you execute the following actions:

- Liquidate all holdings within the account and transfer the balance to my linked bank account via [ACH/Wire Transfer].
- Alternatively, initiate a full transfer of all assets "in-kind" to my new brokerage firm: [New Firm Name], Account Number [New Account Number].
- Provide a final closing statement and a summary of all transactions for the current year for tax purposes.

Please waive any exit or administrative fees associated with this closure, given the circumstances surrounding the service provided. I expect a confirmation of this request in writing within [number] business days.

Sincerely,

[Your Signature]

[Your Printed Name]