

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

[Date]

[Wealth Manager's Name]
[Financial Institution Name]
[Department Name]
[Institution Address]
[City, State, Zip Code]

Subject: Instruction to Close Account and Transfer Portfolio

Dear [Wealth Manager's Name],

Please accept this letter as a formal request to close my wealth management account(s) held with [Financial Institution Name], effective immediately.

Account Information:

- Account Name: [Account Holder Name]
- Account Number(s): [List Account Number(s)]

I request a full transfer of all assets, including cash balances and securities, to my new account at the receiving institution listed below:

Receiving Institution Details:

- Receiving Institution Name: [New Institution Name]
- Receiving Account Number: [New Account Number]
- DTC Number (if applicable): [DTC Number]
- Contact Person: [Name of Contact at New Institution]
- Phone Number: [Contact Phone Number]

Transfer Instructions:

Please transfer all assets "in-kind." If any assets cannot be transferred in-kind, please liquidate those specific holdings and transfer the proceeds as cash. Please notify me of any specific assets that require liquidation before proceeding.

Once the transfer is complete, please close the aforementioned account(s) and provide a final closing statement for my records. Please ensure all recurring fees, standing orders, or automated transfers associated with these accounts are cancelled.

If you require any further documentation or have questions regarding this request, please contact me directly at [Your Phone Number].

Thank you for your assistance in this matter.

Sincerely,

[Your Signature]

[Your Printed Name]