

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

[Date]

[Advisor Name or Department Name]  
[Financial Institution Name]  
[Institution Address]  
[City, State, Zip Code]

### **RE: Notice of Termination of Wealth Management Accounts**

Dear [Name of Advisor or Account Manager],

Please accept this letter as formal notification to close the following wealth management accounts held with [Financial Institution Name], effective [Date/Immediately]:

- **Account Type:** [e.g., Investment Management] - **Account Number:** [Number 1]
- **Account Type:** [e.g., Traditional IRA] - **Account Number:** [Number 2]
- **Account Type:** [e.g., Trust Account] - **Account Number:** [Number 3]

Regarding the closure of these accounts, I request the following actions be taken:

1. Liquidate all holdings and positions within these accounts.
2. Cancel all standing orders, automated transfers, and recurring management fees.
3. Send a final closing statement for each account to my address listed above.
4. Remit the total remaining balance, minus any applicable closing fees, via [Check / Wire Transfer to: Account Details].

Please provide written confirmation once the accounts have been successfully closed and the funds have been disbursed. If there are any specific forms required to complete this process, please send them to me immediately.

Thank you for your prompt attention to this matter.

Sincerely,

[Your Signature]  
[Your Printed Name]