

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

[Date]

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

RE: Account Downgrade Request for Account Number: [Your Account Number]

Dear [Customer Service Team / Account Manager Name],

I am writing to formally request a downgrade of my current investment portfolio account. I would like to transition my account from the [Current Account Level, e.g., Premium/Gold] tier to the [Desired Account Level, e.g., Basic/Standard] tier.

Please process this change effective as of [Requested Date]. I understand that this downgrade may result in changes to my fee structure, available investment tools, and level of personalized service. I have reviewed the terms of the new account level and accept these changes.

I request that you confirm the following in writing once the transition is complete:

- The exact date the downgrade becomes effective.
- The updated fee schedule applicable to my new account tier.
- Confirmation that no existing assets will be liquidated during this transition unless required by account minimums.

If there are any specific forms required to finalize this request, please send them to my email address listed above. Otherwise, please proceed with the downgrade using the information provided in this letter.

Thank you for your prompt assistance with this matter.

Sincerely,

[Your Signature]

[Your Printed Name]