

VIA CERTIFIED MAIL / RETURN RECEIPT REQUESTED

Date: [Date]

To: [Recipient Name/Competitor Name]
[Recipient Address]
[City, State, Zip Code]

**RE: CEASE AND DESIST UNLAWFUL WEALTH MANAGEMENT COMPETITION
AND MISAPPROPRIATION**

Dear [Recipient Name],

This law firm represents [Your Company Name] ("the Company") in matters regarding its intellectual property, client relationships, and contractual rights. It has come to our attention that you are currently engaged in unlawful competitive activities that interfere with our client's wealth management operations.

Specifically, it has been reported that you are: [Describe specific actions, e.g., soliciting existing clients, using proprietary investment strategies, or violating a non-compete/non-solicitation agreement].

These actions constitute a direct violation of [mention specific contract, e.g., the Employment Agreement dated XX/XX/XXXX] and represent a breach of fiduciary duty, tortious interference with business relationships, and misappropriation of trade secrets (including client lists and financial profiles).

DEMAND IS HEREBY MADE THAT YOU IMMEDIATELY:

- Cease and desist from all further contact or solicitation of the Company's clients;
- Cease and desist from using any proprietary data, financial models, or confidential information belonging to the Company;
- Return all physical and electronic records containing the Company's trade secrets; and
- Provide written assurance by [Deadline Date] that you have complied with these demands.

Failure to comply with this demand will leave our client with no choice but to pursue all available legal remedies, including seeking an immediate injunction, monetary damages, and recovery of legal fees in a court of law.

This letter is formal notice of a legal dispute. You are further instructed to preserve all documents, emails, and electronic records related to your competitive activities and communication with the Company's clients.

Governing yourself accordingly,

Sincerely,

[Your Signature/Name]

[Your Title/Law Firm Name]

[Phone Number]

[Email Address]