

[Date]

[Customer Name]

[Customer Address]

[City, State, Zip Code]

Subject: Notice of Transfer of Financial Records

Dear [Customer Name],

This letter is to formally notify you that your financial records held with [Name of Originating Bank] regarding account number(s) ending in [Last four digits of account numbers] are being transferred to [Name of Receiving Institution].

The transfer of these records is occurring due to [Reason for transfer, e.g., merger, acquisition, or sale of branch]. This transfer is scheduled to be completed by [Date of Transfer].

Please be advised of the following:

- Your historical statements and transaction data will be moved to the new institution.
- There will be [no/a temporary] interruption in your ability to access electronic records during the transition period.
- The privacy and security of your data will continue to be maintained in accordance with federal and state regulations.

You are not required to take any action at this time. However, if you have any questions regarding this transfer or wish to obtain copies of your records prior to the move, please contact our customer service department at [Phone Number] or visit your local branch.

Thank you for your continued trust in our services.

Sincerely,

[Authorized Signature]

[Typed Name and Title]

[Name of Originating Bank]