

**Date:** [Insert Date]

**Subject: Notice of Unclaimed Wealth Management Property**

**Account Number:** [Insert Account Number]

**Property Reference:** [Insert Reference ID]

Dear [Owner Name],

Our records indicate that [Financial Institution Name] is holding unclaimed property or funds associated with the wealth management account listed above. This property consists of [Type of Assets, e.g., Cash, Stocks, Dividends] with an estimated value of [Insert Amount].

There has been no activity or contact regarding this account for a period of [Number] years. Under state law, if these assets remain unclaimed, we are required to transfer them to the State Controller's Office as abandoned property (Escheatment).

**How to Claim Your Property:**

To prevent these funds from being transferred to the state, please complete one of the following actions by [Deadline Date]:

- Sign and return the enclosed "Claim Affirmation" form.
- Log in to your online portal at [Website URL] to perform a transaction.
- Contact your Wealth Advisor directly at [Phone Number].

If you have already taken action to reactivate this account, please disregard this notice.

Sincerely,

[Authorized Signature]

[Name of Sender]

[Department Name]

[Financial Institution Name]