

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

[Date]

[Relationship Manager Name]
[Financial Institution Name]
[Department Name]
[Institution Address]
[City, State, Zip Code]

RE: Official Request for Wealth Management Account Closure

Dear [Relationship Manager Name],

Please accept this letter as formal authorization to close my wealth management account(s) held with [Financial Institution Name], effective immediately.

Account Details:

- Account Name: [Account Name]
- Account Number(s): [List Account Number(s)]
- Account Type: [e.g., Investment Portfolio, Trust, Managed Account]

I request that all remaining funds, including accrued interest and dividends, be liquidated and transferred via [Wire Transfer / Check] to the following destination:

- Receiving Bank: [Bank Name]
- Account Holder Name: [Name]
- Routing Number: [Number]
- Account Number: [Number]

Furthermore, please cancel all standing orders, direct debits, and recurring management fees associated with these accounts. Once the closure is complete, please provide a final statement and written confirmation of the closure for my records.

If there are any remaining administrative requirements or documents needed to facilitate this request, please contact me directly at [Phone Number].

Thank you for your assistance in this matter.

Sincerely,

[Signature]

[Your Printed Name]