

CLIENT FAREWELL EXAMPLE LETTER

Dear [name],

I wanted to contact you regarding some important news. As we have talked, I'm approaching a new stage in my life and after 25 years in the business, I will be retiring in the coming months. I am only taking this step because of the confidence I have in the hard work that you, Maria and I have done during our time together, and I firmly believe that you and your family are well positioned for the future.

We have all experienced the complementary skills that Maria has brought to our practice. Going forward, although Maria will be your primary contact, I will also be available if there are any questions I can answer. You will be in capable hands with Maria.

We have taken every step possible to make sure this is a smooth and seamless transition for you. On a personal level, I want to thank you for the privilege of serving as your financial professional. I hope that you and your family have felt cared for during our years of working together and wish you the very best.

Best wishes,

[name]