

Sample Retirement Letter

[Date]

JOE CLIENT
123 MAIN STREET
ANYTOWN US 12345-6789

Dear Clients and Friends,

I have some exciting news to share with you! I have announced my official retirement date as [Date]. I could have never made this decision without the quality team I have behind me. Financial Advisors [Name] and [Name] have a combined industry experience of approximately [X] years. They have my total confidence in their ability and dedication to serve your needs. [Name] will continue to serve as our senior assistant.

I have spent many hours thinking of how to say “Thank You” for the business, and the trust you have placed in me over the years but far more, for the friendships that have grown over this time. Please accept my sincere and utmost gratitude.

In departing, I will be under contract with [Firm Name] for [X] years. This restricts me from any advisory functions regarding your accounts. You will be getting correspondence from [Firm Name] that will outline this in further detail. This relates to business only and will not interfere with what I sincerely hope is our ongoing friendship.

I wish you amazing success.

Warmest Regards,

[Name]
Financial Advisor

