

Investment Account Transfer Authorization

Date: [Insert Date]

To Whom It May Concern,

I, [Your Full Name], hereby authorize the transfer of my investment account with [Current Financial Institution] to [New Financial Institution].

Account Details:

- Account Holder Name: [Your Full Name]
- Account Number: [Your Account Number]
- Social Security Number: [Your SSN]

Please initiate the transfer process as per the attached documents and verify the success of this transaction once completed.

Thank you for your prompt attention to this matter.

Sincerely,

[Your Signature (if sending a hard copy)]

[Your Printed Name]

[Your Address]

[Your Email Address]

[Your Phone Number]