

Investment Account Transfer Notification

Date: [Insert Date]

Dear [Recipient's Name],

We are writing to inform you that your investment account, numbered [Account Number], is scheduled to be transferred from [Current Institution Name] to [New Institution Name]. The transfer will take place on [Transfer Date].

Please ensure that any outstanding transactions are completed before the transfer date to avoid any delays in the process. After the transfer is complete, your account will be accessible under the new institution with the same investment options.

If you have any questions or require further assistance, please do not hesitate to contact us at [Contact Information].

Thank you for your attention to this matter.

Sincerely,

[Your Name]

[Your Title]

[Your Company Name]

[Your Company Contact Information]