

Investment Account Transfer Request

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, ZIP Code]

[Email Address]

[Phone Number]

[Recipient Name]

[Financial Institution Name]

[Institution Address]

[City, State, ZIP Code]

Dear [Recipient Name],

I am writing to request the transfer of my investment account for tax optimization purposes. Please find the relevant details of my current and new investment accounts below:

Current Investment Account:

Account Number: [Current Account Number]

Financial Institution: [Current Institution Name]

New Investment Account:

Account Number: [New Account Number]

Financial Institution: [New Institution Name]

For tax optimization, I believe that transferring my assets to the new account will better align my investment strategy with my financial goals. Please initiate the transfer process at your earliest convenience.

If you require any further documentation or information, please do not hesitate to contact me.

Thank you for your assistance.

Sincerely,

[Your Name]