

Your Name  
Your Address  
City, State, Zip Code  
Email Address  
Phone Number  
Date

Recipient's Name  
Title  
Company's Name  
Company's Address  
City, State, Zip Code

Dear [Recipient's Name],

I hope this letter finds you well. I am writing to formally appeal the financial advice I received from your firm, which I believe was insufficient and has led to adverse outcomes in my financial planning.

On [date of advice], I sought your firm's expertise regarding [specific financial issues]. Unfortunately, the advice provided did not adequately address my situation, leading to [describe the adverse impact, e.g., financial loss, inability to meet financial goals].

I have gathered supporting documentation that outlines the nature of the advice received, as well as the repercussions I have faced. I would appreciate the opportunity to review this matter in detail with you.

Thank you for your attention to this important matter. I look forward to your prompt response and hope we can resolve this issue amicably.

Sincerely,  
[Your Name]