

Retirement Transition Proposal

Date: [Insert Date]

To: [Client's Name]

From: [Your Name, Your Firm's Name]

Dear [Client's Name],

I hope this message finds you well. As I approach my retirement and prepare for a transition, I want to ensure that you are well-informed and supported during this process. After years of working together, my priority is to make this transition as seamless as possible for you.

Transition Plan Overview

1. Delegation of Responsibilities
2. Introduction to New Advisor
3. Timeline of Transition

Details of the Transition

The following steps will be taken to ensure a smooth transition:

- Careful selection of a qualified investment advisor to take over my responsibilities.
- Formal introduction meetings between you and the new advisor.
- Detailed review of your current investment portfolio and financial goals.
- Regular updates throughout the transition process.

Next Steps

Please let me know your availability for a discussion regarding this transition. I want to make sure that all of your concerns are addressed and that you feel confident moving forward.

Thank you for your trust and partnership over the years. I look forward to continuing our relationship in this new capacity.

Sincerely,

[Your Name]

[Your Firm's Name]

[Your Contact Information]