APPROVED LETTERHEAD [DEPARTING REP]

<Date>

<Client Name>

< Street Address>

<City>, <State> <ZipCode>

Dear <insert client name>

[DBA] is committed to offering you a high level of service and keeping you informed of important news that can impact you pursuing your financial goals and planning for life. With that in mind, please note that [Departing Rep] is no longer associated with our firm.

We will be contacting you soon to introduce the replacement for this Financial Advisor; however, we wanted to alert you with this important information regarding your LPL Financial investment accounts. Your account remains with [DBA] and no other changes will be made.

If you have any urgent questions concerning service-related issues with your account, or wish to move your account to another advisor or broker/dealer, please contact <Name> and <Phone Number>.

Thank you for your continued business and trust as we help you reach your goals and objectives in the most collaborative and transparent way.

Sincerely,

<Name>

Managing Partner

Encl. [Receiving Rep’s] ADV 2B