

# **FORTUNE FINANCIAL**

## **Sample Transfer Letter (To Client)**

**This is the Fortune Financial Sample Transfer Letter which may be used with the Individual Account Transfer Form.**

**Use this form letter to inform your current clients of your change of Broker/Dealer to FFSI and request for signature.**

**Copy as needed.**

**Please note: If you should choose to create your own transfer letter, it should first be approved by FFSI.**

Dear (client),

I am writing you this letter to inform you about an exciting change in my business operations. In order to serve my clientele better, I have recently changed my Broker/Dealer affiliation to Fortune Financial Services, Inc. from \_\_\_\_\_. The only change you will notice will be the Broker/Dealer name change on your statements.

In order to retain you as my client, please sign and return the enclosed Broker/Dealer Change Form.

I look forward to our continued relationship. If you have any questions, please feel free to contact me at \_\_\_\_\_.

For your convenience, I have enclosed a self addressed and stamped envelope.

Sincerely,

Rep signature  
Rep name