"Breaking Up" with your Advisor

We know that "breaking up" with your former advisor may feel overwhelming. To make it easier, we've prepared a templated email that you may choose to send to your advisor before transferring your accounts to Fiat Wealth Management. While not required, many clients have found this "script" helpful.

EMAIL TEMPLATE

Subject Line: Transition and Gratitude

Dear [Previous Advisor Name],

I have decided to partner with a new firm that specializes in Retirement Planning, and I am writing to inform you of this decision. While I appreciate the guidance you have provided, I feel that this change is in my best interest at this stage of life, given the new firm's focus on proactive tax planning, along with retirement income and distribution planning. I am currently working with them to transfer my accounts under their management and wanted to notify you before the official transfer requests are submitted.

Again, thank you for your assistance.

Sincerely,

[Your Name]

Upon receiving your email, the advisor may request to meet and/or talk with you in an attempt to change your mind.

If you chose to decline, here is a sample email template that you can use or modify as needed:

Thank you so much for the offer! At this time, I would like to politely decline. Again, I appreciate everything that you did for me and I wish you all the best!