



# NOTIFICATION OF CLIENT CANCELLATION OF INVESTMENT ADVISORY AGREEMENT

Date: \_\_\_\_\_ Advisor Name: \_\_\_\_\_

Effective \_\_\_\_\_ please remove the following client/asset(s) from current from Money Management.

Client Name: \_\_\_\_\_

Reason for cancellation: \_\_\_\_\_

Are all accounts being cancelled from money management? \_\_\_\_\_

If "No", please list the account being cancelled from management:

### VARIABLE ANNUITY ACCOUNTS

Company: \_\_\_\_\_ Contract No.: \_\_\_\_\_ Liquidate Account? \_\_\_\_\_

Company: \_\_\_\_\_ Contract No.: \_\_\_\_\_ Liquidate Account? \_\_\_\_\_

Company: \_\_\_\_\_ Contract No.: \_\_\_\_\_ Liquidate Account? \_\_\_\_\_

### BROKERAGE ACCOUNTS

Account No.: \_\_\_\_\_ Special Instructions: \_\_\_\_\_

Account No.: \_\_\_\_\_ Special Instructions: \_\_\_\_\_

Account No.: \_\_\_\_\_ Special Instructions: \_\_\_\_\_

Account No.: \_\_\_\_\_ Special Instructions: \_\_\_\_\_

I understand that the above named accounts will no longer be managed by Sowell Management Services.

\_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Date

7301 River Pointe Drive, North Little Rock, Arkansas 72113

Phone: 501.219.2434 | Toll-Free: 800.399.2391 | Fax: 501.812.6380 | [www.sowellmanagement.com](http://www.sowellmanagement.com)

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