

Retirement Fund Rebalancing Proposal

Date: [Insert Date]

[Recipient's Name]

[Recipient's Position]

[Company/Organization Name]

[Address]

[City, State, Zip Code]

Subject: Proposal for Rebalancing Retirement Fund

Dear [Recipient's Name],

I hope this message finds you well. I am writing to propose a rebalancing of our retirement fund portfolio to ensure we are aligned with both our investment objectives and current market conditions.

After conducting a thorough analysis, I believe that adjusting our allocations will enhance our risk management and optimize returns. Specifically, I recommend the following changes:

- Increase allocation to [Asset Class] from [Current Percentage]% to [Proposed Percentage]%.
- Decrease allocation to [Asset Class] from [Current Percentage]% to [Proposed Percentage]%.
- Introduce [New Asset Class] at [Proposed Percentage]% to diversify our holdings.

These adjustments are based on [briefly state rationale, e.g., market trends, historical performance, etc.]. I am confident that these changes will better position our fund for future growth while maintaining prudent risk levels.

I would appreciate the opportunity to discuss this proposal further and address any questions or concerns you may have. Please let me know a convenient time for you to meet.

Thank you for considering this proposal.

Sincerely,

[Your Name]

[Your Position]

[Your Company]

[Your Contact Information]