

Investment Fund Asset Allocation Proposal

Date: [Insert Date]

To: [Recipient Name]

Company: [Recipient Company Name]

Address: [Recipient Address]

Dear [Recipient Name],

We are pleased to present our proposal for the asset allocation strategy for [Investment Fund Name]. Our objective is to optimize risk-adjusted returns, while aligning with the fund's investment goals and time horizon.

Proposed Asset Allocation

- Equities: [Percentage]% - Focused on [Domestic/International] markets with emphasis on [Sector or Style].
- Bonds: [Percentage]% - Aiming for [Short/Medium/Long] term fixed income securities.
- Real Estate: [Percentage]% - Investment in [Type of Real Estate Investments].
- Alternative Investments: [Percentage]% - Including [Hedge Funds, Commodities, etc.].
- Cash/Cash Equivalents: [Percentage]% - For liquidity management.

Rationale for Allocation

We believe this allocation strikes a balance between potential growth and risk management based on the current market conditions and the fund's objectives.

Next Steps

We would appreciate the opportunity to discuss this proposal further and answer any questions you may have. Please let us know a convenient time for a follow-up meeting.

Thank you for considering our proposal.

Sincerely,

[Your Name]

[Your Title]

[Your Company]

[Your Contact Information]