

Follow-Up on Beneficiary Preferences for Asset Allocation

Dear [Beneficiary's Name],

I hope this message finds you well. I am writing to follow up on our previous discussion regarding your preferences for asset allocation.

As part of our commitment to ensuring that your investments align with your goals and values, we would appreciate your feedback on the proposed asset allocation strategies we discussed.

Please take a moment to review the following options:

- Option A: [Brief description]
- Option B: [Brief description]
- Option C: [Brief description]

We kindly request that you provide your preferences by [insert deadline date]. Your input is invaluable in tailoring solutions that best fit your needs.

Should you have any questions or require further clarification, please do not hesitate to reach out.

Thank you for your attention to this matter. We look forward to hearing from you soon.

Sincerely,

[Your Name]

[Your Position]

[Your Company]

[Your Contact Information]