Investment Portfolio Overview

Date: [Insert Date]

To: [Recipient's Name]

Address: [Recipient's Address]

Dear [Recipient's Name],

As part of our ongoing estate planning discussions, I am pleased to provide you with an overview of your investment portfolio. This overview is intended to help you assess your current financial position and align it with your estate planning goals.

1. Current Investment Allocation

- Stocks: [Percentage]%
- Bonds: [Percentage]%
- Real Estate: [Percentage]%
- Cash Equivalents: [Percentage]%
- Other Investments: [Percentage]%

2. Performance Summary

Your portfolio has achieved an average annual return of [X]% over the past [X] years. Below is a summary of the key performers:

- [Investment 1]: [Return]%
- [Investment 2]: [Return]%
- [Investment 3]: [Return]%

3. Risk Assessment

The current risk profile of your portfolio is categorized as [Conservative/Moderate/Aggressive]. This reflects your investment goals along with your time horizon of [X years].

4. Future Considerations

As we move forward with your estate planning, consider the following actions:

- Review beneficiary designations
- Consider establishing a trust
- Evaluate potential tax implications

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

Sincerely,

[Your Name]

[Your Title]

[Your Company]

[Contact Information]