

Request for Investment Portfolio Analysis

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Your Email]

[Your Phone Number]

[Recipient's Name]

[Recipient's Title]

[Company/Organization Name]

[Company Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I hope this message finds you well. I am writing to formally request an analysis of my current investment portfolio. As I aim to optimize my investment strategy and align it with my financial goals, I believe that a thorough review is essential.

Specifically, I would appreciate insights on the following aspects:

- Performance evaluation of current holdings
- Recommendations for diversification
- Risk assessment and adjustments
- Alternative investment opportunities

Please let me know your availability for this analysis and any necessary documentation I should prepare. I am looking forward to your expertise and guidance in enhancing my investment approach.

Thank you for considering my request. I look forward to your prompt response.

Sincerely,

[Your Name]