

Durable Asset Allocation Plan

Date: [Insert Date]

To: [Client's Name]

Address: [Client's Address]

Dear [Client's Name],

We are pleased to present you with your Durable Asset Allocation Plan. This plan aims to create a balanced investment strategy tailored to your financial goals and risk tolerance.

1. Investment Objectives

Our primary objectives for your investment portfolio are as follows:

- Wealth Preservation
- Long-term Growth
- Income Generation

2. Asset Allocation Strategy

Your allocation will include a mix of the following asset classes:

- Equities: [Percentage]
- Bonds: [Percentage]
- Real Estate: [Percentage]
- Alternative Investments: [Percentage]

3. Monitoring and Rebalancing

This plan will be reviewed and rebalanced on a [Quarterly/Annual] basis to ensure alignment with your goals.

4. Conclusion

We are committed to helping you achieve your financial objectives. Please feel free to reach out with any questions or concerns regarding this plan.

Sincerely,

[Your Name]

[Your Title]

[Company Name]

[Contact Information]