

[Your Name]  
[Your Address]  
[City, State, Zip Code]  
[Email Address]  
[Phone Number]

[Date]

[Advisor's Name]  
[Company's Name]  
[Company's Address]  
[City, State, Zip Code]

Dear [Advisor's Name],

I hope this message finds you well. I am reaching out to request a review of my investment portfolio. As we approach the end of the quarter, I believe it's a good time to evaluate my current investments and assess their performance in relation to my financial goals.

Could we schedule a meeting to discuss my portfolio in detail? I would appreciate your insights on potential adjustments and any recommendations you may have moving forward.

Thank you for your assistance. I look forward to your prompt response.

Sincerely,  
[Your Name]