

Asset Allocation Modification Notification

Date: [Insert Date]

To: [Recipient's Name]

[Recipient's Address]

[City, State, Zip Code]

Dear [Recipient's Name],

We are writing to inform you of a modification to your asset allocation strategy. After a thorough review of your investment portfolio and current market conditions, we believe that adjustments are necessary to better align with your financial goals.

Effective [Insert Effective Date], your new asset allocation will be as follows:

- Equities: [X%]
- Bonds: [X%]
- Real Estate: [X%]
- Cash and Cash Equivalents: [X%]

This modification aims to enhance your portfolio's performance while managing risk appropriately. Should you have any questions or require further assistance, please do not hesitate to contact us at [Insert Contact Information].

Thank you for your continued trust in our services.

Sincerely,

[Your Name]

[Your Title]

[Your Company]

[Your Company Address]

[City, State, Zip Code]

[Your Contact Information]