

Investment Portfolio Adjustment Request

Date: [Insert Date]

To: [Investment Advisor's Name]

[Company Name]

[Company Address]

[City, State, Zip Code]

Dear [Investment Advisor's Name],

I hope this message finds you well. I am writing to request an adjustment to my investment portfolio.

After reviewing my current investments and considering my financial goals, I believe it is necessary to modify my portfolio as follows:

- Increase allocation to [Investment Type/Asset].
- Decrease allocation to [Investment Type/Asset].
- Consider investing in [New Investment Option].

Please let me know your thoughts on this proposed adjustment, and if you require any further information from my end to proceed.

Thank you for your attention to this matter. I look forward to your prompt response.

Sincerely,

[Your Name]

[Your Contact Information]

[Your Account Number]