

# Dear [Client's Name],

We hope this message finds you well. We are reaching out to inform you of a proposed change to your investment allocation that we believe aligns with your current financial goals.

## Current Allocation

- [Asset Class 1]: [Current Percentage]
- [Asset Class 2]: [Current Percentage]
- [Asset Class 3]: [Current Percentage]

## Proposed Allocation

- [Asset Class 1]: [New Percentage]
- [Asset Class 2]: [New Percentage]
- [Asset Class 3]: [New Percentage]

The rationale behind this change includes [brief explanation of reasons, such as market trends or personal financial objectives].

We recommend reviewing this proposed allocation and welcome any questions or discussions you might want to have regarding this matter.

Thank you for your continued trust in our services.

Sincerely,  
[Your Name]  
[Your Position]  
[Your Company]