

Asset Management Service Portfolio Rebalancing Notification

Date: [Insert Date]

To: [Client Name]

[Client Address]

Dear [Client Name],

We hope this letter finds you well. As part of our ongoing commitment to manage your investment portfolio effectively, we would like to inform you about the latest portfolio rebalancing we have undertaken.

After conducting a thorough analysis of market conditions and your investment goals, we have made adjustments to your portfolio to ensure it remains aligned with your risk tolerance and financial objectives. The following changes have been implemented:

- Increased allocation to [Asset Class/Investment] by [Percentage]
- Reduced allocation to [Asset Class/Investment] by [Percentage]
- Introduced [New Investment/Product] to enhance diversification

We believe these adjustments will help optimize your returns while managing potential risks. If you have any questions or would like to discuss the details of these changes further, please do not hesitate to reach out.

Thank you for trusting us with your investment management. We look forward to continuing to support your financial goals.

Sincerely,

[Your Name]

[Your Position]

[Company Name]

[Contact Information]