

# Asset Allocation Rebalancing Alert

Date: [Insert Date]

Dear [Client's Name],

We would like to inform you that it's time for your scheduled asset allocation review and potential rebalancing of your investment portfolio. Your current asset allocation may have deviated from your target due to market fluctuations.

The recommended adjustments are as follows:

- **Stocks:** Increase to [X]% from [Y]%
- **Bonds:** Decrease to [X]% from [Y]%
- **Real Estate:** Maintain at [X]%

These changes aim to help realign your portfolio with your investment objectives and risk tolerance. If you have any questions or would like to discuss this further, please do not hesitate to reach out.

Thank you for your attention to this matter.

Sincerely,  
[Your Name]  
[Your Title]  
[Your Company]