

Client Portfolio Rebalancing Update

Date: [Insert Date]

Dear [Client's Name],

We hope this message finds you well. As part of our ongoing commitment to manage your investment portfolio effectively, we have conducted a thorough review of your current asset allocation.

In light of recent market developments and your investment goals, we have made the following adjustments to your portfolio:

- **Asset Class:** [Adjustments made, e.g., increased allocation to equities]
- **New Allocation:** [Percentage breakdown]
- **Reasoning:** [Brief explanation for the changes]

These changes are intended to align your portfolio with your risk tolerance and long-term objectives. We believe that these adjustments will enhance the potential for growth and mitigate risks associated with market volatility.

If you have any questions or would like to discuss this further, please do not hesitate to reach out. We are here to support you and ensure that your investment strategy remains on track.

Thank you for your continued trust in us.

Sincerely,

[Your Name]

[Your Title]

[Your Company]