

Portfolio Adjustment Notification

Date: [Insert Date]

Dear [Recipient's Name],

We hope this message finds you well. We are writing to inform you of an important adjustment to your portfolio.

After a thorough review, we have identified opportunities that align better with your investment goals and risk tolerance. As a result, we will be rebalancing your portfolio effective [Insert Date of Adjustment].

The following changes will be made:

- Position A will be adjusted to [new percentage].
- Position B will be added with an allocation of [percentage].
- Position C will be reduced to [new percentage].

These changes aim to enhance your investment strategy and improve overall performance. If you have any questions or concerns about this adjustment, please do not hesitate to reach out to us.

Thank you for your continued trust in our services.

Sincerely,

[Your Name]

[Your Position]

[Your Company]

[Contact Information]