

# Investment Strategy Alignment Check

Date: [Insert Date]

Client Name: [Insert Client Name]

Address: [Insert Client Address]

Dear [Client Name],

We hope this letter finds you well. As part of our commitment to ensuring that your investment strategy remains aligned with your financial goals and market conditions, we would like to conduct an Investment Strategy Alignment Check.

This process will involve a comprehensive review of your current portfolio, risk tolerance, and investment objectives. Our goal is to ensure that your investments continue to reflect your financial aspirations and adapt to any changes in your personal circumstances or market environment.

Please let us know a convenient time for you, so we can discuss this in detail. Your feedback is invaluable, and we want to make sure that you are comfortable and confident in your investment strategy.

Thank you for your attention, and we look forward to hearing from you soon.

Sincerely,

[Your Name]

[Your Position]

[Your Company]

[Your Contact Information]