

Investment Policy Statement Adjustment Proposal

Date: [Insert Date]

To: [Recipient Name]

[Recipient Title]

[Company Name]

[Company Address]

[City, State, Zip Code]

Dear [Recipient Name],

We are writing to propose adjustments to our current Investment Policy Statement (IPS) in light of recent market trends and changes in our investment objectives.

Proposed Adjustments

- **Risk Tolerance:** [Describe changes to risk tolerance]
- **Asset Allocation:** [Describe proposed asset allocation changes]
- **Investment Restrictions:** [Mention any new investment restrictions]

Rationale for Changes

[Provide justification for each proposed adjustment, citing market analysis and investment performance metrics.]

Next Steps

We suggest scheduling a meeting to discuss these adjustments further and to address any questions you may have.

Thank you for considering this proposal. We look forward to your feedback.

Sincerely,

[Your Name]

[Your Title]

[Your Company Name]

[Your Phone Number]

[Your Email Address]