

Investment Policy Statement

Risk Assessment Discussion

Date: [Insert Date]

To: [Insert Recipient Name]

From: [Insert Your Name]

Subject: Discussion of Risk Assessment in Investment Policy Statement

Dear [Recipient Name],

I hope this message finds you well. As part of our ongoing efforts to ensure that our investment strategy aligns with our risk tolerance and financial objectives, I would like to initiate a discussion regarding the risk assessment section of our Investment Policy Statement (IPS).

In our previous meetings, we identified several key factors that influence our risk appetite, including:

- Investment Goals
- Time Horizon
- Market Conditions
- Liquidity Needs

Given the current economic landscape and our investment objectives, I believe it is essential to revisit our risk parameters and ensure they remain appropriate. I suggest we hold a meeting to discuss potential adjustments and any new considerations we should incorporate into our IPS.

Could you please let me know your availability for the upcoming week? Your insights will be invaluable in this discussion.

Thank you for your attention to this matter.

Best regards,

[Your Name]

[Your Position]

[Your Company]

[Your Contact Information]