

Investment Policy Statement Update

Date: [Insert Date]

To: [Client's Name]

From: [Your Name / Your Firm's Name]

Dear [Client's Name],

We hope this letter finds you well. As part of our commitment to ensuring your investment strategy aligns with your financial goals and current market conditions, we have reviewed and updated your Investment Policy Statement (IPS).

The key changes to your IPS include:

- **Investment Objectives:** [Briefly describe any changes]
- **Asset Allocation:** [Briefly describe any adjustments]
- **Risk Tolerance:** [Briefly describe any updates]
- **Investment Constraints:** [Briefly describe any modifications]

We believe these updates are essential to optimize your portfolio's performance and to meet your long-term financial aspirations. Please review the attached updated IPS document for detailed insights and feel free to reach out with any questions or concerns.

Thank you for trusting us with your investment strategy. We look forward to continuing to support you in your financial journey.

Best regards,

[Your Name]

[Your Position]

[Your Firm's Name]

[Contact Information]