

Retirement Asset Allocation Review

Date: [Insert Date]

To: [Client's Name]

From: [Your Name]

Subject: Retirement Asset Allocation Review

Dear [Client's Name],

I hope this message finds you well. As part of our ongoing commitment to your financial health and retirement planning, I would like to take this opportunity to review your current asset allocation.

Based on our previous discussions and your long-term objectives, the following points outline your current allocation:

- Equities: [Percentage]
- Fixed Income: [Percentage]
- Cash/Cash Equivalents: [Percentage]
- Alternative Investments: [Percentage]

We recommend evaluating the following factors to determine if adjustments are necessary:

- Changes in your risk tolerance
- Market conditions and economic outlook
- Your retirement timeline
- Expected lifestyle changes in retirement

I would suggest scheduling a meeting to discuss these factors in detail and make any necessary adjustments to your portfolio. Please let me know your availability for the coming weeks.

Thank you for your attention to this important matter, and I look forward to our continued partnership in securing your retirement.

Sincerely,

[Your Name]

[Your Position]

[Your Company]

[Your Contact Information]