

# Retirement Portfolio Summary

Date: [Insert Date]

To: [Recipient's Name]

From: [Your Name]

Subject: Retirement Portfolio Summary

Dear [Recipient's Name],

I hope this message finds you well. As we approach your retirement, I wanted to provide you with a summary of your retirement portfolio. Below are the key details:

## Portfolio Overview

Total Portfolio Value: \$[Insert Amount]

## Asset Allocation

- Stocks: [Insert Percentage]%
- Bonds: [Insert Percentage]%
- Cash/Cash Equivalents: [Insert Percentage]%
- Other Investments: [Insert Percentage]%

## Performance Summary

Year-to-Date Return: [Insert Percentage]%

5-Year Annualized Return: [Insert Percentage]%

## Next Steps

As we move forward, it is important to review and adjust your portfolio as needed to align with your retirement goals. Please let me know if you would like to schedule a meeting to discuss this further.

Thank you for the opportunity to assist you with your retirement planning. I look forward to hearing from you.

Sincerely,

[Your Name]

[Your Title]

[Your Contact Information]