

# Dear [Client's Name],

We hope this message finds you well. As part of our ongoing commitment to managing your investment portfolio effectively, we have conducted a review of your current asset allocation.

Based on our analysis and the changing market conditions, we recommend a rebalancing of your investment portfolio. This adjustment will help maintain your desired level of risk and align your investments with your financial goals.

## Proposed Changes

- **Increase in Equity Investments:** From [Current %] to [New %]
- **Decrease in Fixed Income Investments:** From [Current %] to [New %]
- **Introduction of [New Asset Class]:** [Percentage %]

Please review the proposed changes, and let us know if you have any questions or if you would like to discuss this further. We aim to ensure that your investment strategy aligns with your risk tolerance and long-term objectives.

Thank you for trusting us with your investment needs.

Best regards,  
[Your Name]  
[Your Title]  
[Your Company]  
[Your Contact Information]