

Portfolio Adjustment Request

Date: [Insert Date]

To: [Client's Name]

Address: [Client's Address]

Dear [Client's Name],

I hope this letter finds you well. I am writing to discuss the current status of your investment portfolio and to propose necessary adjustments that align with your financial goals.

After a thorough review of your portfolio, I have identified some areas where we could optimize your investments to enhance returns and reduce risks. Specifically, I recommend the following adjustments:

- Increase allocation in [specific asset class or investment]
- Reduce exposure to [specific asset class or investment]
- Consider diversifying into [new investment opportunities]

These adjustments aim to ensure that your portfolio is well-positioned to navigate market fluctuations while aligning with your long-term objectives. I would appreciate the opportunity to discuss these recommendations with you in more detail.

Please let me know a convenient time for us to meet or if you prefer to discuss this over the phone. Thank you for entrusting me with your investment management.

Sincerely,

[Your Name]

[Your Title]

[Your Company Name]

[Your Contact Information]