

Client Asset Allocation Review

Date: [Insert Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Dear [Client Name],

We hope this message finds you well. As part of our ongoing commitment to provide you with tailored investment strategies, we are pleased to present the results of your recent asset allocation review.

After evaluating your current portfolio and considering your financial goals, risk tolerance, and market conditions, we recommend the following adjustments to your asset allocation:

- **Equities:** [Percentage] %
- **Bonds:** [Percentage] %
- **Cash/Cash Equivalents:** [Percentage] %
- **Alternative Investments:** [Percentage] %

These adjustments aim to enhance your portfolio's performance while aligning it more closely with your financial objectives.

Please feel free to reach out to us with any questions or if you would like to schedule a meeting to discuss this review in greater detail.

Thank you for your continued trust in our services.

Sincerely,

[Your Name]

[Your Title]

[Your Company]

[Contact Information]