

Managed Fund Investment Objectives

Date: [Insert Date]

To: [Investor's Name]

Address: [Investor's Address]

Dear [Investor's Name],

We are pleased to provide you with a summary of the investment objectives pertaining to your managed fund investment with us. Our primary goal is to align our investment strategies with your financial objectives and risk tolerance.

Investment Objectives

- **Capital Appreciation:** Aim for long-term growth of your capital through strategic asset allocation.
- **Income Generation:** Generate regular income through dividends, interest, and other income-producing investments.
- **Risk Management:** Implement strategies to minimize risk while pursuing returns suitable to your profile.
- **Liquidity:** Maintain a level of liquidity that allows you to access funds when required.
- **Diversification:** Achieve diversification across various asset classes to mitigate risk and enhance potential returns.

We remain committed to monitoring your portfolio and adjusting our strategies to meet these objectives. Should you have any questions or wish to discuss your investment further, please do not hesitate to contact us.

Thank you for entrusting us with your investment.

Sincerely,

[Your Name]

[Your Position]

[Your Company]

[Contact Information]