

Client Capital Preservation Policy

Date: [Insert Date]

Client Name: [Insert Client Name]

Address: [Insert Client Address]

Dear [Client Name],

We are pleased to present you with our Capital Preservation Policy designed to protect your investments while aiming for potential growth. This policy seeks to ensure the safety of your principal while providing an opportunity for returns through diversified investment strategies.

Objectives

- Safeguarding of principal investment
- Minimizing the risk of loss
- Providing liquidity for immediate financial needs

Investment Strategy

Our approach includes, but is not limited to:

- Investing in low-volatility assets
- Maintaining a diversified portfolio
- Regular monitoring and rebalancing of investments

Review Schedule

This policy will be reviewed annually, or as needed, to ensure it aligns with your financial goals and changes in the market environment.

If you have any questions regarding this policy or would like to discuss it further, please feel free to reach out.

Thank you for choosing us to help manage your investments.

Sincerely,

[Advisor Name]

[Title]

[Company Name]

[Contact Information]