

Investment Goals Discussion

Date: [Insert Date]

To: [Family Office Name]

From: [Your Name]

Subject: Discussion on Investment Goals

Dear [Family Office Contact Name],

I hope this message finds you well. As we continue to navigate the ever-changing investment landscape, I believe it is important for us to align our investment goals and strategies to ensure we are on the right path to achieving our family's financial objectives.

To facilitate this discussion, I would like to propose a meeting to cover the following key points:

- Current investment portfolio overview
- Review of short-term and long-term financial goals
- Risk tolerance and asset allocation preferences
- Opportunities for diversification and new investments
- Impact investing and philanthropic considerations

Would you be available to meet on [Insert Proposed Dates] to discuss these important topics? Please let me know your preferred time, and I will do my best to accommodate.

Thank you for your attention to this matter, and I look forward to our discussion.

Best regards,

[Your Name]

[Your Position]

[Your Contact Information]