

Personal Investment Risk Review

Date: [Insert Date]

To: [Client's Name]

Address: [Client's Address]

Dear [Client's Name],

We hope this letter finds you well. As part of our ongoing commitment to your financial health, we would like to conduct a personal investment risk review.

The purpose of this review is to evaluate your current investment portfolio and ensure that it aligns with your financial goals, risk tolerance, and market conditions. This process will involve:

- Assessing your current investment assets.
- Determining your risk appetite and investment time horizon.
- Reviewing the performance of your investments.
- Providing recommendations for adjustments if necessary.

Please let us know your availability for a meeting to discuss this in further detail. We want to ensure that your investment strategy continues to support your long-term objectives.

Thank you for your attention to this important matter. We look forward to hearing from you soon.

Sincerely,

[Your Name]

[Your Position]

[Company Name]

[Contact Information]