

Asset Allocation Adjustment Notification

Dear [Client's Name],

We hope this message finds you well. As part of our ongoing commitment to managing your investment portfolio effectively, we are writing to inform you about the upcoming adjustment in your asset allocation.

After a thorough review of market conditions and your personal financial goals, we have decided to implement the following changes:

- **Equities:** Increase allocation from [X]% to [Y]%
- **Fixed Income:** Decrease allocation from [X]% to [Y]%
- **Alternative Investments:** Maintain allocation at [X]%.

These adjustments are designed to enhance your portfolio's performance and align with your long-term financial objectives. We believe that this revised allocation will better position your investments in the current economic environment.

If you have any questions or would like to discuss these changes in detail, please do not hesitate to reach out to your wealth management advisor at [Contact Information].

Thank you for your continued trust in us.

Sincerely,

[Your Name]

[Your Position]

[Company Name]

[Company Contact Information]