

Asset Reallocation Inquiry

Date: [Insert Date]

[Your Name]

[Your Position]

[Your Organization]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Recipient Name]

[Recipient Position]

[Recipient Organization]

[Recipient Address]

[City, State, Zip Code]

Dear [Recipient Name],

I hope this message finds you well. I am writing to inquire about the potential reallocation of assets within our trust funds. Given the current market conditions and our investment objectives, we believe it may be prudent to review our asset allocation strategy.

Specifically, we would like to discuss the following:

- Current asset allocation breakdown
- Performance metrics of existing assets
- Recommendations for potential reallocations

Could we schedule a meeting at your earliest convenience to discuss this matter further? Your insights and expertise would be invaluable as we consider these adjustments.

Thank you for your attention to this inquiry. I look forward to your prompt response.

Sincerely,

[Your Name]

[Your Position]

[Your Organization]