

# Asset Reallocation Request

Date: [Insert Date]

To: [Insert Financial Advisor's Name]

Company: [Insert Company Name]

Address: [Insert Company Address]

Dear [Financial Advisor's Name],

I hope this message finds you well. I am writing to formally request a reallocation of assets within my investment portfolio, account number [Insert Account Number].

After careful consideration, I believe that a reallocation is necessary to align my investments with my current financial goals and market conditions. I would like to propose the following changes:

- Increase allocation to [Asset Class/Investment] from [Current Percentage] to [New Percentage]
- Decrease allocation to [Asset Class/Investment] from [Current Percentage] to [New Percentage]
- Introduce [New Investment] with an allocation of [Percentage]

I appreciate your attention to this matter and look forward to your guidance on executing this reallocation. Please let me know if you require any further information or if we can schedule a call to discuss this in detail.

Thank you for your assistance.

Sincerely,

[Your Name]

[Your Address]

[Your Phone Number]

[Your Email Address]