

Investment Account Asset Reallocation Proposal

Date: [Insert Date]

To: [Recipient's Name]

[Recipient's Title]

[Company Name]

[Company Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I hope this letter finds you well. I am writing to propose a reallocation of assets within my investment account, account number [Insert Account Number]. After a thorough analysis of my current investment strategy and the changing market conditions, I believe a reallocation will better align with my financial goals and risk tolerance.

Currently, my portfolio consists of the following assets:

- [Asset 1: e.g., 50% Stocks]
- [Asset 2: e.g., 30% Bonds]
- [Asset 3: e.g., 20% Real Estate]

I propose the following adjustments:

- [Reallocation Plan: e.g., 40% Stocks]
- [Reallocation Plan: e.g., 40% Bonds]
- [Reallocation Plan: e.g., 20% Real Estate]

This new allocation aims to enhance my overall returns while maintaining an acceptable level of risk. I am confident that this adjustment will contribute positively to my financial objectives.

I would appreciate your review of this proposal and look forward to your feedback. Please feel free to contact me at [Your Phone Number] or [Your Email Address] if you require further details.

Thank you for your attention to this matter.

Sincerely,
[Your Name]
[Your Address]
[City, State, Zip Code]
[Your Phone Number]
[Your Email Address]