

Letter of Adjustment to Retirement Plan Options

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Recipient's Name]

[Company/Organization Name]

[Recipient's Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I hope this message finds you well. I am writing to formally request adjustments to my current retirement plan options. After reviewing my financial goals and considering changes in my circumstances, I believe it is important to reassess my retirement strategy.

Specifically, I would like to discuss the following adjustments:

- [Adjustment 1: Description]
- [Adjustment 2: Description]
- [Adjustment 3: Description]

I would appreciate the opportunity to meet and discuss these options in greater detail. Please let me know your availability for a meeting. Thank you for your attention to this matter.

Sincerely,

[Your Name]

[Your Job Title]