

Dear [Client's Name],

Thank you for taking the time to discuss your financial goals with us. Based on your risk tolerance, investment objectives, and time horizon, we have developed a customized asset allocation strategy tailored specifically for you.

Proposed Asset Allocation

- **Equities:** 60%
- **Bonds:** 30%
- **Cash & Equivalents:** 10%

Investment Objectives

Your primary objectives are to achieve long-term growth while balancing risk and maintaining liquidity. This allocation is designed to align with those goals.

Next Steps

Please review the proposed asset allocation and let us know if you have any questions or require adjustments. We are committed to ensuring your investment strategy fits your unique preferences.

Looking forward to hearing from you soon!

Sincerely,
[Your Name]
[Your Title]
[Your Company]