

[Your Name]
[Your Address]
[City, State, ZIP Code]
[Email Address]
[Phone Number]
[Date]

[Recipient's Name]
[Recipient's Title]
[Company Name]
[Company Address]
[City, State, ZIP Code]

Subject: Request for Investment Recommendations Based on Updated Graduated Tax Bracket

Dear [Recipient's Name],

I hope this message finds you well. I am writing to formally request an update to my investment recommendations in light of my recent change in graduated tax bracket. With my financial situation evolving, I seek your expertise to align my investment strategy appropriately.

Specifically, I would appreciate your advice on:

- Tax-efficient investment options that suit my new tax bracket.
- Any adjustments needed in my current portfolio to optimize for tax implications.
- Strategies that can enhance my overall returns while considering my risk tolerance.

Thank you for your attention to this matter. I look forward to your prompt response, as I am eager to ensure my investments are properly structured.

Best regards,
[Your Name]