

# Investment Portfolio Asset Allocation Review

Date: [Insert Date]

Dear [Client's Name],

We hope this letter finds you well. As part of our ongoing commitment to your financial success, we have conducted a thorough review of your investment portfolio's asset allocation.

## Current Asset Allocation

Your current asset allocation is as follows:

- Equities: [XX%]
- Bonds: [XX%]
- Real Estate: [XX%]
- Cash/Cash Equivalents: [XX%]
- Alternative Investments: [XX%]

## Performance Overview

Over the last [insert time frame], your portfolio has [outperformed/underperformed] the benchmark by [X%]. Here are the key drivers:

- [Key Driver 1]
- [Key Driver 2]
- [Key Driver 3]

## Recommendations

Based on our analysis, we recommend the following adjustments to optimize your portfolio:

- [Recommendation 1]
- [Recommendation 2]
- [Recommendation 3]

We believe these adjustments will better align your investment strategy with your long-term goals and risk tolerance.

## Next Steps

Please review this information at your earliest convenience. We would be happy to discuss your portfolio further during our next meeting. Feel free to reach out to us if you have any questions beforehand.

Thank you for your continued trust in us as your investment advisor.

Sincerely,

[Your Name]

[Your Title]

[Your Company]

[Contact Information]