

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Investment Firm Name]

[Investment Firm Address]

[City, State, Zip Code]

Dear [Investment Manager's Name],

I am writing to formally request a withdrawal from my investment portfolio for the purpose of rebalancing my assets. My account number is [Your Account Number].

After reviewing my current investment strategy, I believe that adjusting my portfolio by withdrawing a portion of my funds will enhance my overall investment goals.

I would like to withdraw [specific amount or percentage] to reposition my investments in accordance with my financial objectives. I request that this process be initiated at your earliest convenience.

Thank you for your assistance in this matter. Please confirm the details of the withdrawal and any necessary actions on my part.

Sincerely,

[Your Name]

[Your Signature (if sending a hard copy)]