

Important Update: Multi-Asset Allocation Changes

Date: [Insert Date]

Dear [Client's Name],

We hope this message finds you well. We are writing to inform you of important changes to your investment portfolio's asset allocation aimed at optimizing your returns and managing risks more effectively.

New Asset Allocation Overview:

- **Equities:** [Percentage]%
- **Fixed Income:** [Percentage]%
- **Alternatives:** [Percentage]%
- **Cash & Cash Equivalents:** [Percentage]%

This strategic shift in allocation is designed to [brief explanation of the rationale behind the change]. We believe these adjustments will position your portfolio better in light of [market conditions or investment objectives].

If you have any questions or would like to discuss this change further, please do not hesitate to reach out to your account manager or contact us directly at [Contact Information].

Thank you for your continued trust in us.

Sincerely,

[Your Company Name]

[Your Name]

[Your Position]