

# Proactive Investment Tax Efficiency Assessment

Date: [Insert Date]

[Your Name]

[Your Title]

[Your Company]

[Your Address]

[City, State, Zip]

[Email Address]

[Phone Number]

Dear [Client's Name],

We appreciate the trust you have placed in us to manage your investments. As part of our commitment to providing you with the best possible service, we have conducted a proactive assessment of your investment portfolio's tax efficiency.

Our analysis includes:

- Reviewing the tax implications of your current investment strategy.
- Identifying opportunities for tax-loss harvesting.
- Recommending adjustments to improve your after-tax returns.

We believe that by implementing these strategies, you can enhance your overall investment performance and keep more of your hard-earned money. We would be happy to discuss our findings and recommendations at your earliest convenience.

Please feel free to reach out to us to schedule a meeting. Thank you for your continued trust in our services.

Sincerely,

[Your Name]

[Your Title]

[Your Company]