

# Asset Allocation Recommendations

Date: [Insert Date]

To: [Client's Name]

From: [Your Name]

Subject: Recommendations for Asset Allocation Strategy

Dear [Client's Name],

I hope this message finds you well. Based on our recent discussions regarding your financial goals and risk tolerance, I have tailored the following asset allocation recommendations for your portfolio.

## Recommended Asset Allocation

- **Equities: 60%**
  - U.S. Large-Cap Stocks: 30%
  - International Stocks: 15%
  - Small-Cap Stocks: 15%
- **Bonds: 30%**
  - U.S. Treasury Bonds: 15%
  - Corporate Bonds: 10%
  - Municipal Bonds: 5%
- **Alternative Investments: 10%**
  - Real Estate Investment Trusts (REITs): 5%
  - Commodities: 5%

## Rationale

This allocation is designed to provide a balance between growth and risk management, aligning with your investment objectives. The focus on equities aims for long-term growth, while the bond component provides stability during market volatility.

## Next Steps

Please review these recommendations and feel free to reach out if you have any questions or need further clarification. I am here to assist you in making informed investment decisions.

Thank you for trusting me with your investment strategy.

Sincerely,

[Your Name]

[Your Title]

[Your Contact Information]