

# Authorization for Portfolio Review

Date: \_\_\_\_\_

To Whom It May Concern,

I, **[Your Name]**, residing at **[Your Address]**, hereby authorize **[Adviser's Name]** of **[Adviser's Company Name]** to review my financial portfolio.

This authorization includes accessing all necessary financial documents and statements related to my investments and assets.

Please ensure that this authorization is respected and that all relevant information is shared with my financial adviser.

Thank you for your attention to this matter.

Sincerely,

**[Your Name]**

**[Your Contact Information]**