

[Date]

[Investment Firm Name]

[Advisor Name]

[Address]

[City, State, Zip Code]

Re: Asset Reallocation Request for Account Number: [Account Number]

Dear [Advisor Name],

I am writing to formally request a reallocation of the assets currently held in my investment account. Due to a shift in my long-term financial strategy and current market conditions, I would like to adjust my portfolio to better align with my updated risk tolerance.

Please execute the following changes to my asset distribution:

- **Current Asset Class:** [Name] -> **New Target Allocation:** [Percentage]%
- **Current Asset Class:** [Name] -> **New Target Allocation:** [Percentage]%
- **Current Asset Class:** [Name] -> **New Target Allocation:** [Percentage]%

I request that these trades be executed as soon as possible. Please notify me via email at [Email Address] or by phone at [Phone Number] once the reallocation has been completed or if you require further authorization.

Thank you for your prompt attention to this matter.

Sincerely,

[Your Signature]

[Your Printed Name]

[Your Mailing Address]