

Date: [Date]

To: [Recipient Name/Financial Institution]

Account Number: [Account Number]

Subject: Portfolio Liquidation and Future Investment Strategy

Dear [Contact Name],

This letter serves as formal authorization to liquidate the following assets within my portfolio, effective [Date]:

- [Asset Name/Ticker] - [Full Liquidation / Percentage / Amount]
- [Asset Name/Ticker] - [Full Liquidation / Percentage / Amount]
- [Asset Name/Ticker] - [Full Liquidation / Percentage / Amount]

Reason for Liquidation:

[Insert Reason: e.g., Rebalancing, Capital Requirements, Market Outlook Change]

New Investment Strategy:

Following the liquidation, the resulting cash balance should be managed according to the following strategy:

- **Allocation:** [e.g., 60% Equities, 40% Fixed Income]
- **Risk Tolerance:** [e.g., Conservative, Moderate, Aggressive]
- **Time Horizon:** [e.g., Long-term, 5-10 years]
- **Specific Reinvestments:** [List specific funds or sectors if applicable]

Please ensure that all transaction fees and tax implications are accounted for during this process. Once the liquidation is complete, please provide a written confirmation and a summary of the new portfolio positioning.

If you require any additional information or further documentation, please contact me at [Phone Number] or [Email Address].

Sincerely,

[Your Signature]

[Your Printed Name]