

[Company Name]
[Company Address]
[City, State, Zip Code]
[Date]

[Recipient Name]
[Recipient Address]
[City, State, Zip Code]

Subject: Notification of Record High Portfolio/Account Value

Dear [Recipient Name],

We are pleased to inform you that as of [Date], your account ending in [Last 4 Digits of Account Number] has reached a record high market value of:

[Total Value Amount]

This milestone represents a significant increase in your total holdings. This notification is for your records and serves as a summary of your current financial standing with [Company Name].

While this record high is a positive development, we recommend reviewing your investment allocations to ensure they remain aligned with your long-term goals and risk tolerance. If you have any questions or would like to discuss your portfolio strategy, please contact your account manager at [Phone Number] or [Email Address].

Thank you for your continued trust in our services.

Sincerely,

[Sender Name]
[Title]
[Company Name]