

[Date]

[Investor Name]  
[Address Line 1]  
[City, State, Zip Code]

Dear [Investor Name],

I am writing to you because of your significant standing in the investment community. In the current volatile market environment, ensuring that a high-net-worth portfolio is properly optimized for both risk mitigation and capital preservation is more critical than ever.

Our firm specializes in bespoke wealth management and strategic asset allocation for private clients. We would like to formally offer you a **Complimentary Comprehensive Portfolio Analysis**. This confidential review focuses on:

- Identification of hidden concentration risks and overlaps.
- Analysis of net-of-fee performance against customized benchmarks.
- Stress testing against potential global economic shifts.
- Evaluation of tax-efficiency and estate planning integration.

This analysis is provided with no obligation. Our goal is simply to provide you with a high-level second opinion on your current trajectory and to demonstrate the depth of our institutional-grade research.

If you are interested in a private consultation, please contact my office at [Phone Number] or reply directly to this email at [Email Address].

We look forward to the possibility of working with you.

Sincerely,

[Your Name]  
[Your Title]  
[Company Name]