

[Your Name]
[Your Address]
[City, State, Zip Code]
[Phone Number]
[Email Address]

[Date]

[Lender/Consultant Name]
[Company Name]
[Address]
[City, State, Zip Code]

RE: Strategy for Equity Leveraging - [Property Address]

Dear [Recipient Name],

I am writing to formally outline my intent to leverage the built-up equity in my property located at [Property Address] to facilitate further investment opportunities and optimize my current portfolio.

Based on current market valuations, the property has an estimated value of \$[Amount], with a remaining mortgage balance of \$[Amount]. This represents a loan-to-value (LTV) ratio of approximately [Percentage]%, leaving significant accessible equity.

My proposed strategy involves the following:

- **Equity Release:** Accessing \$[Amount] through a [Cash-out Refinance / Home Equity Line of Credit (HELOC) / Second Mortgage].
- **Reinvestment:** Deploying the released funds as a down payment for the acquisition of [Description of New Investment, e.g., a multi-family unit or commercial space].
- **Debt Service:** Ensuring the projected rental income from the new acquisition covers the increased financing costs of the primary property.

I have attached my current financial statements, property appraisal reports, and a summary of my investment track record for your review. I would like to schedule a meeting to discuss the most tax-efficient and cost-effective financing products available to execute this strategy.

I look forward to your professional guidance on this matter.

Sincerely,

[Your Signature]

[Your Printed Name]