

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Subject: Advisory Regarding Recent Regulatory Policy Changes and Fiduciary Duties

Dear [Client Name],

We are writing to provide an update regarding recent regulatory policy changes enacted by [Name of Regulatory Body] and how these developments impact our fiduciary obligations to you.

As your designated fiduciary, we are legally and ethically committed to acting in your best interest. The recent changes to [Specific Policy or Regulation Name] involve the following key updates:

- [Summary of change 1]
- [Summary of change 2]
- [Summary of change 3]

These adjustments may affect the management of your [Account Type/Portfolio] specifically regarding [Disclosure/Investment Strategy/Risk Management]. Our team is currently reviewing your holdings to ensure full compliance with the new standards while maintaining your established financial objectives.

Action Required:

At this time, no immediate action is required on your part. However, we recommend a brief consultation to discuss potential strategy adjustments. We have scheduled a preliminary review of your account for [Date/Time].

If you have any questions regarding these regulatory shifts or how they influence our management of your assets, please contact us directly at [Phone Number] or [Email Address].

Sincerely,

[Your Name]

[Your Title]

[Company Name]