[Date]

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

Subject: Advisory Regarding Fiduciary Responsibility and Wealth Management Changes

Dear [Client Name],

This letter serves as a formal advisory regarding upcoming changes to the management of your investment portfolio and our ongoing fiduciary obligations to you. As your financial advisors, we are legally and ethically bound to act in your best interests at all times, prioritizing your financial well-being above our own.

Overview of Changes

Effective [Effective Date], the following adjustments will be made to your wealth management strategy:

- [Description of change 1, e.g., Reallocation of asset classes]
- [Description of change 2, e.g., Transition to a new custodial platform]
- [Description of change 3, e.g., Updates to fee structures or service models]

Fiduciary Standards and Oversight

In implementing these changes, we have conducted a thorough review to ensure they align with your stated investment objectives, risk tolerance, and long-term financial goals. Our fiduciary duty includes:

- **Duty of Care:** Acting with the diligence and skill that a prudent professional would exercise.
- **Duty of Loyalty:** Disclosing any potential conflicts of interest and ensuring all recommendations are unbiased.
- **Monitoring:** Continuously overseeing the performance and suitability of your investments.

Next Steps

Please review the enclosed documentation detailing the specific impact of these changes on your accounts. No immediate action is required on your part unless you wish to discuss alternative strategies or have questions regarding these updates.

We remain committed to transparency and the prudent management of your wealth. If you have any questions, please contact our office at [Phone Number] or via email at [Email Address].

Sincerely,

[Advisor Name]
[Title]
[Firm Name]