

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Subject: URGENT: Important Update Regarding Your Portfolio

Dear [Client Name],

I am writing to bring your immediate attention to recent developments that may impact your investment portfolio. As your Wealth Management Advisor, I am monitoring the following situation closely:

Reason for Alert: [Insert Reason, e.g., Market Volatility, Interest Rate Change, Specific Stock Performance, or Regulatory Update]

Current Impact: [Briefly describe how this affects the client's current holdings or strategy]

Our Recommended Action:

[Action Item 1: e.g., Rebalance portfolio]

[Action Item 2: e.g., Shift to liquid assets]

[Action Item 3: e.g., No immediate trade, maintain long-term outlook]

We have already begun analyzing the best path forward to protect your capital and align with your long-term financial goals. I would like to schedule a brief call to discuss these adjustments in detail.

Please let me know your availability for a call on [Date] at [Time], or feel free to contact my office directly at [Phone Number].

Thank you for your continued trust.

Sincerely,

[Advisor Name]

[Title]

[Firm Name]

[Email Address]