

[Your Name]  
[Your Title/Company]  
[Your Address]  
[Phone Number]  
[Email Address]

[Date]

[Client Name]  
[Client Address]

Subject: Presentation of Wealth Management Portfolio Documents

Dear [Client Name],

Please find enclosed the formal documentation regarding your wealth management portfolio for the period ending [Date].

Included in this package are the following documents:

- Portfolio Performance Summary
- Asset Allocation Analysis
- Transaction History Statement
- Updated Investment Policy Statement (if applicable)

These documents provide a comprehensive overview of your current holdings, market performance, and progress toward your long-term financial objectives. Our team has reviewed your asset distribution to ensure it remains aligned with your risk profile and financial goals.

I would like to schedule a brief meeting or call to review these reports with you and discuss any necessary adjustments based on recent market trends. I will contact your office shortly to find a convenient time.

In the meantime, should you have any immediate questions, please do not hesitate to reach out to me directly.

Sincerely,

[Your Signature]

[Your Printed Name]