

Official Retirement Investment Confirmation Letter

Subject: IRA/401(k) Investment Allocation Confirmation

Dear [Account Holder],

This letter confirms the investment allocation changes made to your retirement account as requested on [Date].

Account Information:

- Account type: [IRA/401(k)/403(b)]
- Account number: [Number]
- Previous allocation: [Details]
- New allocation: [Details]
- Effective date: [Date]

Investment Changes:

- [Fund Name]: [Previous %] → [New %]
- [Fund Name]: [Previous %] → [New %]
- Total allocated: 100%

These changes will affect future contributions and may involve rebalancing of existing assets.

Please review the enclosed prospectuses for detailed information about each investment option.

This allocation will remain in effect until you submit a new investment election form. Annual statements and performance reports will be sent to your address on file.

Sincerely,

[Plan Administrator]

[Retirement Plan Company]

Get more templates here:

<https://www.lettersandtemplates.com/letters/confirmation-of-investment-letter>