



# Email outreach: Rethinking the 60/40 Portfolio

Use these sample emails as inspiration or copy and paste them directly.<sup>1</sup>

**1** Email option 1: [download the flyer, “Should Rising Rates Lower Expectations?”](#)  
and attach to email prior to sending

**SUBJECT LINE:**

Let's set up some time to talk

**BODY:**

Hello <Name>,

I wanted to take a few minutes to share some information with you. Due to the double risk of rising interest rates and market volatility, a traditional diversification method\* like a 60% equities/40% bond split might not be the optimal strategy for your portfolio right now.

I've attached an informational flyer on this subject for you to take a look at. Let's set up a time to meet and we can go over some potential solutions designed to help diversify your fixed income risk.

I look forward to speaking with you.

Best wishes,

<Name>

<Contact info>

\* Diversification/asset allocation does not assure or guarantee better performance and cannot eliminate the risk of loss.

<Add other required firm disclosures including FINRA member name if applicable>

<sup>1</sup> Before using these email templates with clients or prospects please consider consulting your firm's Compliance Department or firm policies.

## 2 Email option 2: No attachment

**SUBJECT LINE:**

Let's set up some time to talk

**BODY:**

Hello <Name>,

I wanted to take a few minutes to share some information with you. Due to the double risk of rising interest rates and market volatility, a traditional diversification\* method like a 60% equities/40% bond split might not be the optimal strategy for your portfolio right now.

Let's set up a time to meet and we can go over some potential solutions designed to help diversify your fixed income risk.

I look forward to speaking with you.

Best wishes,

<Name>

<Contact info>

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