Review Meeting Letter – Action Required

***This letter template is for clients where changes are required in their portfolio.***

*You may want to make a follow up with a call two or three weeks after the letter is mailed if you’ve not heard back from the client. Be sure to make note of this outbound follow up call on your CRM.*

Dear Client:

Some of the most important work I do for you, as your Financial Advisor, is to understand your financial situation and the things in life that truly matter – to you. An *annual review*, helps us to ensure that your money continues to work hard for you, supporting you to achieve your unique financial goals. This is especially important if a major life event has recently occurred.

I’ve completed a review of your investments and I have some important items I’d like to discuss with you related to recommended portfolio changes. Can you please contact my Wealth Coordinator, (NAME) at your earliest convenience to arrange a time for us to discuss these changes. You can reach her/him by calling (XXX) XXX-XXXX or by email to (EMAIL ADDRESS).

In addition, please take a moment and give a quick read through the list below:

* Home Purchase
* Retirement
* Family Changes
* Kids go to College
* New Baby or Grandchild
* Wedding
* Illness or Disability
* Elderly Parent Care
* Inheritance
* Lifestyle Downsize
* Travel
* Sale of Business

If you have experienced any of these *Critical Life Events* – I encourage you to share these changes with me when we discuss your portfolio as they may affect the recommendations I provide to you.

I look forward to connecting with you soon to ensure we are fully up-to-date with your situation and make all necessary portfolio updates.

Sincerely,

Advisor Name

Advisor Title

Encl.