

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

RE: Annual Investment Review for [Property Address]

Dear [Client Name],

It is time for your annual property investment review. This report provides an overview of your property's performance over the last twelve months and outlines market trends affecting your investment.

Property Performance Summary:

- Current Estimated Market Value: \$[Amount]
- Total Rental Income (Past 12 Months): \$[Amount]
- Total Expenses & Maintenance: \$[Amount]
- Net Operating Income: \$[Amount]

Market Analysis:

The local real estate market has seen a [Percentage]% change in value over the past year. Current demand for rental properties in [Neighborhood/Area] remains [High/Stable/Low], suggesting that your investment is positioned for [Growth/Steady Income].

Recommendations for the Upcoming Year:

Based on our review, we suggest the following actions to maximize your return:

- [Recommendation 1, e.g., Adjust rent to market rates]
- [Recommendation 2, e.g., Minor cosmetic renovations]
- [Recommendation 3, e.g., Review insurance or financing terms]

I would like to schedule a brief call or meeting to discuss these details and your long-term goals for this portfolio. Please let me know your availability for next week.

Thank you for your continued trust.

Sincerely,

[Your Name]

[Your Company]

[Your Phone Number]

[Your Email Address]