[Date]

[Client Name]
[Client Address]
[City, State, Zip Code]

Dear [Client Name],

I am writing to invite you to a personalized Retirement Real Estate Wealth Portfolio Review. As you approach or navigate your retirement years, ensuring your real estate assets are optimized for income, tax efficiency, and legacy planning is essential.

The goal of this review is to provide you with a clear picture of your current real estate holdings and how they align with your long-term financial goals. During our session, we will cover:

- **Current Market Valuation:** An updated analysis of your properties' current equity.
- **Cash Flow Analysis:** Evaluating rental income versus expenses and market trends.
- **Portfolio Optimization:** Discussing potential 1031 exchanges or downsizing opportunities to increase liquidity.
- **Risk Management:** Reviewing leverage levels and property management efficiency.

Our records indicate it has been [Number] months since our last comprehensive deep dive into your portfolio. Given recent shifts in the market and interest rates, now is an ideal time to ensure your strategy remains sound.

Please let me know if you are available for a brief meeting on [Date] at [Time], or feel free to suggest a time that works better for your schedule. I look forward to helping you secure your real estate legacy.

Best regards,

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