

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Dear [Client Name],

Subject: Three-Year Performance and Portfolio Strategy Review

It has been three years since we established your investment portfolio, and I would like to invite you to a formal "Move Up" review session. Reaching this milestone provides an ideal opportunity to evaluate the long-term performance of your assets and ensure your strategy remains aligned with your evolving financial goals.

During this review, we will focus on the following:

- **Performance Analysis:** A detailed look at your cumulative returns over the past 36 months compared to market benchmarks.
- **Rebalancing:** Adjusting your asset allocation to account for market shifts and maintain your target risk profile.
- **Goal Alignment:** Discussing any changes in your life-such as career moves, family milestones, or retirement timelines-that may require a strategy adjustment.
- **Future Outlook:** Reviewing our projections for the next three-year cycle.

I have analyzed your current holdings and have several recommendations to discuss regarding potential "move up" opportunities in your equity and fixed-income positions.

Please let me know your availability for a brief meeting or call next week. Alternatively, you can schedule a time directly through my calendar link: [Insert Link].

Thank you for your continued trust and partnership over the last three years.

Sincerely,

[Advisor Name]

[Company Name]

[Phone Number]

[Email Address]