

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Dear [Client Name],

As part of our commitment to your long-term financial success, we are reaching out to conduct your annual Strategic Wealth Real Estate Review. While traditional portfolios focus on stocks and bonds, we believe your real estate holdings are a critical component of your overall net worth and legacy planning.

The current market environment has created new opportunities and challenges for property owners. We would like to sit down with you to discuss the following:

- **Current Market Valuation:** An updated assessment of your property's equity in today's market.
- **Portfolio Diversification:** Evaluating if your real estate concentration aligns with your risk tolerance.
- **Tax & Efficiency Strategies:** Reviewing potential benefits regarding property taxes, depreciation, or 1031 exchange opportunities.
- **Cash Flow Analysis:** For investment properties, analyzing if your current returns are meeting your wealth-building benchmarks.

Our goal is to ensure that your real estate assets are working as hard as possible to support your lifestyle and long-term financial goals. We are not just looking at a single transaction, but at your entire wealth trajectory.

Please let us know a convenient time next week for a brief meeting or phone call to go over these details. You can reach us directly at [Phone Number] or by replying to this email.

We look forward to helping you optimize your wealth.

Best regards,

[Your Name]

[Your Title]

[Company Name]

[Phone Number]

[Email Address]