[Date]

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

Subject: Scheduling Your Annual Account Review - [Account Number/Policy Number]

Dear [Client Name],

Your account renewal is approaching on [Renewal Date]. To ensure that your current coverage and services continue to meet your evolving needs, it is time for our annual account review.

This review is a brief meeting designed to:

- Evaluate your current plan performance.
- Discuss any changes in your goals or requirements.
- Identify potential adjustments to optimize your benefits.
- Review upcoming renewal terms and pricing.

Please let us know your availability for a 20-minute call or meeting during the following times:

- [Option 1: Date and Time]
- [Option 2: Date and Time]
- [Option 3: Date and Time]

If these times do not work for you, please suggest an alternative or use our online scheduling link: [Insert Link].

We value your partnership and look forward to speaking with you soon.

Sincerely,

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