[Date]

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

Dear [Client Name],

I hope this letter finds you well. As we approach the anniversary of our partnership, I would like to invite you to our office for your Annual Strategy and Portfolio Review.

This dedicated session is designed to ensure that your financial roadmap remains aligned with your evolving goals and the current market landscape. During our meeting, we will focus on:

- A comprehensive performance review of your current holdings.
- Updates regarding significant life changes or new legacy goals.
- Strategic adjustments to tax planning and wealth preservation strategies.
- An overview of new exclusive opportunities relevant to your profile.

My assistant, [Assistant Name], will contact your office in the coming days to find a time that fits your schedule. Alternatively, you may reach us directly at [Phone Number] or [Email Address] to coordinate a preferred date.

We value the trust you place in [Firm Name] and look forward to our continued collaboration in managing your wealth.

Sincerely,

[Advisor Name]
[Title]
[Firm Name]