[Date]

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

Subject: Schedule Your Annual Family Protection Account Review

Dear [Client Name],

It has been one year since we last reviewed your family protection plan. To ensure your coverage still aligns with your family's needs and long-term goals, it is time for your Annual Account Review.

Significant life changes-such as a new home, marriage, the birth of a child, or changes in employment-can affect your protection requirements. This meeting allows us to update your information and ensure there are no gaps in your security.

Please contact our office at [Phone Number] or reply to this email to schedule a brief appointment. We offer meetings via telephone, video conference, or in person at our office.

Requested Review Date: [Insert Date]

Requested Review Time: [Insert Time]

We look forward to speaking with you and continuing to protect what matters most to your family.

Sincerely,

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