[Date]

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

Subject: Schedule Your Annual Account Review

Dear [Client Name],

It has been a pleasure serving your financial and insurance needs over the past year. To ensure that your current coverage and investment strategies remain aligned with your long-term goals, it is time to schedule your Annual Account Review.

During this brief meeting, we will discuss:

- Any major life changes (marriage, new home, retirement plans).
- Review of your current policy limits and beneficiaries.
- Assessment of your investment portfolio performance.
- Potential adjustments to optimize your financial security.

Please contact our office at [Phone Number] or reply to this email to find a time that works best for your schedule. We also offer virtual meetings via [Platform Name] for your convenience.

We look forward to catching up and ensuring your financial future stays on the right track.

Sincerely,

[Advisor Name]
[Company Name]
[Phone Number]
[Email Address]