[Date]

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

Re: Annual Asset Protection Strategy Review

Dear [Client Name],

It has been one year since we implemented your asset protection plan. To ensure your strategy remains effective against potential risks and aligned with current laws, it is time for your First Annual Policy Review.

The purpose of this review is to evaluate:

- **Asset Inventory:** Any new real estate, business interests, or high-value personal property acquired in the last 12 months.
- **Entity Compliance:** Verification that all LLCs, trusts, or corporations are in good standing and being operated correctly.
- **Insurance Alignment:** Confirming that your underlying liability and umbrella insurance policies complement your legal structures.
- **Life Changes:** Updates regarding marriage, divorce, births, or changes in business partnerships that may affect your risk profile.

Please find attached a brief questionnaire to help us prepare for our meeting. Once completed, please contact our office at [Phone Number] or [Email Address] to schedule a review session.

Maintaining your protection requires consistent oversight. We look forward to discussing your continued security.

Sincerely,

[Your Name/Signature]
[Firm/Company Name]