

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

**Subject: Annual Policy Review for Your Retirement Asset Protection Annuity**

Dear [Client Name],

I am writing to schedule your annual policy review for your Retirement Asset Protection Annuity, policy number [Policy Number].

The purpose of this yearly review is to ensure that your current strategy remains aligned with your long-term financial goals and to discuss the performance of your assets over the past twelve months. During our meeting, we will cover:

- A summary of your current account value and growth.
- Confirmation of your designated beneficiaries.
- An assessment of your current income needs and risk tolerance.
- Updates on any legislative changes affecting retirement protection.

Keeping your information up to date is essential for maximizing the protection of your retirement savings. Please contact my office at [Phone Number] or reply to this email at [Email Address] to coordinate a time that is convenient for you.

I look forward to speaking with you soon and continuing to help you secure your financial future.

Sincerely,

[Agent Name]

[Company Name]

[Phone Number]