



# ANNUAL REVIEW MEETING FOLLOW UP

© RIE SOLUTIONS 2019

## Annual Review Meeting Follow Up



Dear *name*

### Annual Review Meeting Follow Up

As always, it was a pleasure seeing you on *date*.

Further to our review meeting, it is our understanding that your current goals and objectives are as follows:

- *You want to maintain your current expenditure levels in retirement.*
- *You want to purchase a property for your daughter Caroline. The amount needed will be in the region of £300,000.*
- *You want to make an additional investment of £70,000 into your pension.*
- *You want to ensure that you family is financially secure in case of your sudden death.*

*Considering the above information and your current financial circumstances, we feel that your overall financial strategy should remain the same, as per your Financial Plan dated <date>. The products you have and where relevant, their underlying investments also remain suitable. We recommend that you continue with the current investment strategy for the following reasons:*

- *Provide a list of reasons*

Continued >





OR

*Considering the above information and your current financial circumstances, we feel that your overall financial strategy outlined in your Financial Plan dated <date> requires updating. In addition, the product(s) you have and where relevant, their underlying investments are no longer suitable.*

*Provide details of what is unsuitable, why and the consequence of doing nothing.*

**What's next?**

Based on our meeting, the following action points are to be addressed over the coming months:

- *Profile to provide detailed recommendations related to your pension in the next two weeks.*
- *Profile to put in place additional protection cover based on the cashflow forecast discussed at the meeting; recommendations to be provided by 1st March 2018.*
- *Profile to provide recommendations for this year's ISAs for Mr & Mrs Blogs in the next two weeks.*
- *Mr & Mrs Blogs to provide the exact amount needed for the property purchase for Caroline as soon as further details are known.*
- *Mr & Mrs Blogs to return a signed copy of the Client Agreement.*

Please do not hesitate to contact us, should you have any questions.

Yours sincerely

*Signature*

