



ANNUAL REVIEW MEETING NOTIFICATION

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Annual Review Meeting Notification



Dear *name*

Annual Review Meeting Notification

Your Annual Review Meeting with *<insert name>* is due in *<insert month>* and I will contact you in the next three days to organise a mutually convenient time and date for that meeting. Alternatively, please feel free to email me with dates of your availability week commencing *<insert date>*.

In preparation for the meeting we would be grateful if you could inform us of any substantial changes to your income, expenditure, assets not managed by us or liabilities. The most recent information and figures held by us can be viewed on the client portal.

I would be grateful, if you could let us know of any substantial changes within the next two weeks to allow us enough time to update your Financial Plan, in advance of the meeting.

Should you have any questions regarding the above or require assistance, please do not hesitate to contact me.

Yours sincerely

Signature

