



ANNUAL REVIEW MEETING FOLLOW UP

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Annual Review Meeting Follow Up



Dear *name*

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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*

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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

