Dear

**RE: 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 post <insert date>.

In preparation, we need you to review some of the information we currently hold.

In this respect, please find attached copies of two documents for your review:

* The first shows your assets and liabilities as listed at our previous meeting. Please can you review the details and amounts of assets not managed by us and amend where necessary ensuring that nothing has been omitted.
* The second shows your income and expenditure figures for last year.

I would be grateful if you could review these and return to me within the next two weeks to allow us sufficient time to update your Financial Plan in advance of the meeting.

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

Kind regards