



ANNUAL REVIEW MEETING CONFIRMATION

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Annual Review Meeting Confirmation



Dear *name*

Annual Review Meeting Confirmation

Further to our telephone conversation, I am pleased to confirm the details of your forthcoming Annual Review Meeting with *name*:

Date & Time: *Date & Time*

Location: *Location*

Please find attached a copy of your 12 Point Financial Health Check document, which forms part of the meeting agenda.

What to bring?

- Current cash balance(s)
- Copies of the latest valuations of investments that are not managed by us
- Any other documents that you may feel relevant
- Proof of identity, such as passport or photocard driving licence, and a utility bill (not mobile phone) that is less than three months old.

We very much look forward to seeing you on *date*.

In the meantime, should you require any further assistance, please do not hesitate to contact me on *xxxx*.

Yours sincerely

Signature



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Implement
Enjoy



Resolve
Implement
Enjoy