

Invitation to Annual Account Review

Dear [Client's Name],

We are pleased to invite you to our Annual Account Review, where we will discuss the performance of your accounts and future strategies to meet your financial goals.

Date: [Insert Date]

Time: [Insert Time]

Location: [Insert Location]

Please confirm your attendance by [RSVP Date]. We look forward to seeing you there!

Best regards,

[Your Name]

[Your Position]

[Your Company]

[Your Contact Information]