

Retirement Investment Planning Discussion

Date: [Insert Date]

To: [Recipient's Name]

From: [Your Name]

Dear [Recipient's Name],

I hope this message finds you well. As we approach the important milestone of your retirement, I would like to schedule a discussion regarding your retirement investment planning.

It's crucial to ensure that your investments align with your retirement goals, risk tolerance, and time horizon. During our meeting, we will review your current investment portfolio, explore various investment options, and consider any necessary adjustments to optimize growth and security as you transition into retirement.

Could you please let me know your availability for the week of [Insert Date]? I believe that a thorough discussion will greatly benefit your retirement planning process.

Thank you, and I look forward to your response.

Best regards,

[Your Name]

[Your Title]

[Your Contact Information]