

# Follow-Up on Your Customized Investment Planning

Dear [Client's Name],

I hope this message finds you well. I wanted to follow up on our recent discussion regarding your customized investment planning. I appreciate the time you took to share your financial goals and aspirations with me.

As we discussed, the following key areas were identified for your investment strategy:

- Your risk tolerance
- Target return on investment
- Investment time horizon
- Portfolio diversification needs

Based on our conversation, I have created a tailored plan that addresses these elements and aligns with your objectives. I would love to schedule a time to review this plan in detail and make any necessary adjustments.

Please let me know your availability for a follow-up meeting next week. I look forward to assisting you in achieving your financial goals.

Best regards,

[Your Name]

[Your Title]

[Your Company]

[Your Phone Number]

[Your Email Address]