

# Dear [Client's Name],

I hope this message finds you well. As part of our commitment to ensuring that your investment portfolio aligns with your current financial goals, we believe it's time to reassess your investment objectives.

Over the past months, there may have been changes in your financial situation, risk tolerance, or overall investment goals. It is vital that we update our strategies to reflect any new information or shifts in your priorities.

We would like to schedule a meeting with you to discuss the following:

- Your current investment performance
- Any changes in your personal or financial circumstances
- Your updated investment goals and time horizon

Please let us know your availability for a meeting in the coming weeks. We look forward to continuing to support you in achieving your financial objectives.

Thank you for your attention.

Sincerely,  
[Your Name]  
[Your Position]  
[Your Company]  
[Your Contact Information]