

Behavioral Investment Counseling Service

Date: [Insert Date]

Dear [Client's Name],

We hope this message finds you well. As part of our commitment to providing you with exceptional service, we would like to schedule your annual review. This is an important opportunity to reflect on your investment strategies and behavioral patterns over the past year.

During this review, we will:

- Assess your current investment portfolio
- Discuss any changes in your financial goals or circumstances
- Identify any behavioral biases that may be influencing your investment decisions
- Provide tailored advice to enhance your investment approach

To schedule this important meeting, please contact us at [Insert Phone Number] or reply to this email with your available times. We look forward to helping you stay on track with your investment objectives.

Thank you for your continued trust in our services.

Sincerely,

[Your Name]

[Your Title]

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