

# Portfolio Review Invitation

Dear [Client's Name],

We hope this message finds you well. As part of our commitment to providing exceptional behavioral investment counseling services, we are pleased to offer you a comprehensive portfolio review.

This review aims to assess your current investment strategy, align it with your financial goals, and address any behavioral biases that may impact your decision-making process. Our team of experienced counselors will work with you to ensure your investments reflect your values and objectives.

## Review Details:

- **Date:** [Insert Date]
- **Time:** [Insert Time]
- **Location:** [Insert Location or Virtual Meeting Link]

Please confirm your availability for the scheduled review. Should you have any questions or require rescheduling, feel free to reach out to us at [Contact Information].

We look forward to assisting you in enhancing your investment experience and achieving your financial aspirations.

Warm regards,

[Your Name]

[Your Position]

[Company Name]

[Contact Information]