

Retirement Portfolio Evaluation Consultation Invitation

Dear [Client's Name],

We hope this message finds you well. As you approach your retirement, it is crucial to evaluate your current financial situation and ensure your portfolio is aligned with your retirement goals.

We would like to invite you for a personalized retirement portfolio evaluation consultation. During this session, we will:

- Review your current investment strategy
- Assess your risk tolerance
- Discuss your retirement objectives
- Make recommendations for adjustments if necessary

Please let us know your available dates and times, and we will do our best to accommodate your schedule. We look forward to assisting you in securing a comfortable and confident retirement.

Best Regards,

[Your Name]

[Your Position]

[Your Company]

[Your Contact Information]