

# Yearly Account Review Notification

Dear [Client's Name],

We hope this message finds you well. As part of our commitment to ensuring that your account is managed effectively and to keep you informed about your investment, we would like to remind you of your yearly account review.

Your account review is scheduled for [Date] at [Time]. During this meeting, we will discuss:

- Your account performance over the past year
- Any changes to your financial goals or situation
- Current market trends and forecasts
- Recommendations for future investments

Please confirm your availability by [Confirmation Deadline]. If for any reason this time does not suit you, feel free to suggest an alternative.

We look forward to hearing from you and continuing to assist you in achieving your financial objectives.

Best regards,

[Your Name]

[Your Position]

[Your Company]

[Contact Information]