

Subject: Schedule for Financial Review Discussion

Dear [Recipient's Name],

I hope this message finds you well. As part of our ongoing commitment to ensuring your financial goals are met, I would like to schedule a financial review discussion with you.

During this meeting, we will review your current financial situation, discuss your goals for the upcoming year, and examine any necessary adjustments to your financial plan.

Please let me know your availability for the following dates:

- [Date Option 1] at [Time]
- [Date Option 2] at [Time]
- [Date Option 3] at [Time]

Feel free to suggest another date or time if none of these options work for you. I look forward to our discussion and helping you achieve your financial objectives.

Thank you!

Best regards,

[Your Name]

[Your Position]

[Your Company]

[Your Contact Information]