Date

Client Name

Address 1

City, Province

Postal Code

Dear CLIENTS FIRST NAME

**RE: Your Credential Asset Management Account – Action Required**

Some of the most important work I do for you, as your Financial Advisor, is to understand your financial situation and the things in life that truly matter – to you. An *annual review*, helps us to ensure that your money continues to work hard for you, supporting you to achieve your unique financial goals. This is especially important if a major life event has recently occurred.

At this time, we wanted to check in with you. Do a little review, of sorts.

Please take a moment and give a quick read through the list below:

* Home Purchase
* Retirement
* Divorce
* Kids go to College
* Loss of spouse
* New Baby or Grandchild
* Wedding
* Illness or disability
* Elderly Parent Care
* Inheritance
* Lifestyle Downsize
* Travel
* Sale of Business

If you have experienced any of these *Critical Life Events* – I encourage you to be in touch. It’s time to get together and catch up! Not only does this give us a chance to chat about the past year, it also gives us a very important opportunity to identify emerging financial needs, reasons to update your portfolio or even to add on to your financial plan. (Saving you money, making you money or protecting your loved ones.)

If there has been no change – and you are good with the plan you’ve got in place, there is no need to meet. If you’ve identified it’s time to catch- up and you wish to arrange a review meeting, please call my Wealth Coordinator, (NAME), to arrange a covenient time for us to meet. You can reach her by calling (XXX) XXX-XXXX or by email to (EMAIL ADDRESS).

Wishing you a great balance of the year and an excellent (NEXT YEAR ie:2017) ahead.

Yours truly,

ADVISORS NAME

APPROVED TITLE

Aviso Asset Management