



ANNUAL REVIEW MEETING DEFERRAL

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Unable to make contact



Dear **name**

Annual Review Meeting Deferral

Further to our correspondence on **date**, we have been unable to contact you to organise your Annual Review Meeting. As such, we assume that you do not wish to meet this year.

Please note that ideally, you should have an annual check-in with your Financial Planner to review all aspects of your financial affairs and ensure they continue to meet your goals and objectives.

We will contact you next year to arrange a meeting in **Month & Year**. Of course, should you decide that you wish to meet before then, please do not hesitate to contact us.

In the meantime, please find enclosed your **Annual Review Pack** which can be also accessed via our secure client portal.

Continued >



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Your Investment Strategy

Based on the information you have provided previously about your financial position and relevant personal circumstances, we believe the products you have, and where relevant their underlying investments, remain suitable, given your objectives. We recommend that you continue with the current investment strategy for the following reasons:

- *Provide a list of reasons*

OR

We believe changes are / may be required, either to one or more of the products that you hold or their underlying investments. This is assuming that your financial position and relevant circumstances are the same as at our last meeting. As such, we urge you to contact us, to discuss the matter further.

Provide details of what is unsuitable, why and the consequence of doing nothing.

Should you have any questions regarding the above or require assistance, please do not hesitate to contact us.

Yours sincerely

Signature



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The exact wording of confirmation of suitability must be checked with your compliance consultants.



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