Dear Obi One,

**Your annual financial review**

Its that time again – its time for your annual review!

**Important reading before the meeting**

We have included the following documents which we strongly suggest you go over to familiarise yourself;

* Your investment valuation
* Last year’s financial plan
* The latest record we have of your personal income statement and balance sheet
* Your latest investment risk profile
* Our latest Terms of Business

**Agenda for the review**

In order to have a great and successful meeting, we need an agenda, and here it is:

1. Your Current Financial Objectives and goals bucket list
2. How has your year been? What’s changed?
3. Strategic Review of your latest financial plan
4. Investments Review
5. Risk profile Review
6. Debt & Loan management
7. Tax Matters (ISA, CGT, Pension, Income Tax)
8. Retirement Planning
9. Protection
10. Estate Planning
11. Re-evaluated Income Information
12. General Expenditure Information for the next 12 months
13. Any other business

**Summary**

We will contact you again to confirm time and place etc.

Please do read the homework.

And as always, we look forward to seeing you shortly.

Yours sincerely