

«Mail\_Name»  
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«Corres\_PCode»

10 June 2009

Dear «Salutation»

I wanted to follow up from our meeting on <date>, I'm glad I was able to help you with your financial planning requirements.

I hope you and the family are keeping well «Insert personal information if you have it noted in your database ie: ask after the children by name / ask after their new house, pets, lifetsyle etc»

I think it's important to keep in contact with my clients and as part of my service I like to offer all my customers reviews of their financial situation once a year. As our lives change, so too can our financial needs and regular reviews could identify where changes need to be made or simply confirm that all is as it should be.

If you have any questions or queries relating to any financial matters please feel welcome to contact me on the above number to make an appointment.

I look forward to hearing from you

Yours Sincerely

«CR»

Q23740 Hxx