[Date]

[Client Name]
[Client Address]
[City, State, Zip Code]

Subject: Important: Request to Update Your Contact Information

Dear [Client Name],

At [Wealth Management Firm Name], we are committed to providing you with the highest level of service and ensuring the security of your accounts. To serve you better and keep your financial information protected, we periodically request that our clients verify their contact details.

Please review and confirm your current information below:

- **Primary Phone:** [Phone Number]
- **Email Address:** [Email Address]
- **Mailing Address:** [Residential Address]

How to update your information:

If any of the above details have changed, please update them by using one of the following methods:

1. Log in to your secure client portal at [Website URL].
2. Call our client services team at [Phone Number].
3. Reply to this letter by mail with the corrected information.

Keeping your information current ensures that you receive timely market updates, account statements, and important tax documentation without delay.

Thank you for your continued trust in our firm. If you have any questions, please contact your Wealth Advisor directly.

Sincerely,

[Advisor Name]
[Title]
[Wealth Management Firm Name]