[Date]

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

Dear [Client Name],

As part of our ongoing commitment to your financial well-being, it is time for your annual Estate Plan Review. Periodic reviews are essential to ensure that your legacy goals remain aligned with current laws and your evolving personal circumstances.

Our records indicate that we should review the following items during our next meeting:

- Updates to Wills and Trust agreements.
- Review of current beneficiary designations on investment accounts and insurance policies.
- Evaluation of tax planning strategies in light of new legislation.
- Changes in family dynamics, such as births, marriages, or shifts in philanthropic goals.
- Verification of Power of Attorney and Healthcare Proxy designations.

I have coordinated with your Relationship Manager to prepare a summary of your current holdings and distribution structures. We also welcome the opportunity to collaborate with your legal and tax advisors to ensure a seamless integration of your private banking strategy and your legal estate documents.

My assistant will contact your office shortly to schedule a convenient time for this discussion. Alternatively, please feel free to reach out to me directly at [Phone Number] or [Email Address].

We value the trust you place in our firm and look forward to continuing our partnership in protecting your family's future.

Sincerely,

[Your Name]
[Your Title]
[Bank/Institution Name]