

[Your Name/Organization Name]
[Your Address]
[City, State, Zip Code]
[Email Address]
[Phone Number]

[Date]

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

Subject: Proposal for Account Upgrade - Milestone Achievement: [Account Balance/Investment Value]

Dear [Client Name],

Congratulations on reaching a significant financial milestone. As of [Date], your account balance has surpassed [Amount], marking a key achievement in your financial journey.

In recognition of this growth, I am pleased to propose an upgrade of your current [Current Account Type] to our [Proposed Account Type]. This transition is designed to provide you with enhanced benefits tailored to your current portfolio size.

The proposed upgrade includes the following advantages:

- Lowered transaction fees and management rates.
- Access to premium investment opportunities and private equity options.
- Dedicated priority support and a personal wealth advisor.
- Advanced financial planning tools and detailed monthly reporting.

Our goal is to ensure that your account structure remains aligned with your increasing net worth and long-term objectives. This upgrade will optimize your returns while providing the high-tier service your portfolio now warrants.

I would like to schedule a brief call or meeting to discuss the specific terms of this upgrade and answer any questions you may have. Please let me know your availability for a conversation next week.

Thank you for your continued trust and partnership.

Sincerely,

[Your Signature]
[Your Printed Name]
[Your Title/Position]