

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Subject: Acknowledgment of Annual Protection Plan Review

Dear [Client Name],

This letter serves as formal acknowledgment that we have completed your Annual Protection Plan Review on [Date of Review].

During our meeting, we reviewed your current coverage, including [list specific plans, e.g., Life, Disability, or Critical Illness insurance]. We have updated your records to reflect the following:

- Confirmation of current beneficiary designations.
- Assessment of current coverage levels against your financial goals.
- Identification of any necessary adjustments or new requirements.

As discussed, the following actions will be taken: [Insert action items or "No changes required at this time"].

Please keep a copy of this acknowledgment for your records. If you have any further questions or if your circumstances change before our next scheduled review, please contact me at [Phone Number] or [Email Address].

Thank you for your continued trust in our services.

Sincerely,

[Advisor Name]

[Company Name]