Dear*<first name>*,

RE: The way forward

It was great to catch up and to spend some time discussing where you are today and what has taken place since we last caught up. It’s always valuable to reflect on what has happened in the past, but it’s even more important to recognise what changes have taken place and identify what needs to done next to keep moving ahead.

To ensure you are comfortable with your progress, please find a summary of the actions items we agreed to during our meeting *(modify as appropriate)*:

**What we need to action:**

* Forward document explaining the application process and application forms for Commonwealth Seniors Health Card
* Follow up your query on advice fees being deducted from your XYZ Pension Account
* Forward the latest Investment Reports including investment performance data

**What you need to do:**

* Examine qualifying criteria for Commonwealth Seniors Health Card and complete application forms if appropriate
* Upgrade home and contents insurance to include home computers and recent new furniture purchases

To continue moving in the right direction, we will contact you in <five> months to provide you with some date and time options for our next progress review meeting. In the meantime, please contact us with any queries or concerns you may have.

Here’s to your continuing progress and success!

*<Sign off>*