From

Arman Topchu

Apartment 14, Mary's Court,

4 Palgrave Gardens, London

NW1 6EW

London

To:

Mr Tyson

Address 1

Address 2

Postcode

United Kingdom

# RE: ISA Top-up 2023/24

Dear Mr Tyson,  
  
I hope you are well.  
  
It was a pleasure to see you yesterday. It was great to discuss X,Y,Z. In this document I plan to...  
  
Please find an updated summary of your assets below

|  |  |  |
| --- | --- | --- |
| Description | Amount | Commentary |
| ISA | £25000 | Text1 |
| GIA | £44000 | Text2 |
| SIPP | £25000 | Text3 |
| **Total** | **£94000** |  |

I recommend that you invest in X,Y,Z as demonstrated below:

|  |  |  |
| --- | --- | --- |
| Description | Amount | Commentary |
| ISA | £20000 | Placeholder |

Your annual fees are 1.0%, which is equal to £250.00

Thank you for your time.  
  
Kind regards,  
  
Arman Topchu