

[Date]

[Policyholder Name]

[Business Name]

[Address Line 1]

[Address Line 2]

Re: Welcome to [Agency/Company Name] - Policy Number: [Policy Number]

Dear [Policyholder Name],

Welcome to [Agency/Company Name]. We are pleased that you have chosen us to protect your business. Our goal is to provide you with the highest level of service and professional guidance for your commercial insurance needs.

Enclosed you will find your policy documents and identification cards. Please review these materials carefully to ensure all information is correct. We recommend keeping these documents in a secure and accessible location.

As your dedicated agent, I am here to assist you with:

- Policy updates or changes as your business grows.
- Issuing Certificates of Insurance (COIs).
- Reviewing coverage limits and endorsements.
- Assisting with the claims process should an incident occur.

If you have any questions or need to make adjustments to your coverage, please contact me directly at [Phone Number] or via email at [Email Address].

Thank you for placing your trust in us. We look forward to a long and successful partnership.

Sincerely,

[Agent Name]

[Title]

[Agency Name]

[Website]