

[Date]

[Policyholder Name]

[Address Line 1]

[Address Line 2]

**Subject: Coverage Summary and Next Steps for Policy #[Policy Number]**

Dear [Policyholder Name],

Thank you for choosing [Insurance Company Name] for your life insurance needs. This letter provides a summary of your Whole Life Insurance policy and outlines the next steps to manage your coverage.

### **Policy Coverage Summary**

- **Insured Name:** [Insured Name]
- **Policy Type:** Whole Life Insurance
- **Death Benefit Amount:** \$[Amount]
- **Policy Effective Date:** [Date]
- **Premium Amount:** \$[Amount]
- **Payment Frequency:** [Monthly/Quarterly/Annually]
- **Cash Value Status:** Accruing as per policy schedule

### **Beneficiary Information**

Your current primary beneficiary is listed as: **[Beneficiary Name]**.

### **Next Steps**

1. **Review Your Documents:** Please review the enclosed policy contract for full terms and conditions.
2. **Secure Your Policy:** Keep this document in a safe place and inform your beneficiaries of its location.
3. **Set Up Online Access:** Register your account at [Website URL] to view your cash value and update contact information.
4. **Confirm Payment Method:** Ensure your [Automatic Debit/Direct Bill] is active to prevent any lapse in coverage.

If you have any questions or need to make changes to your coverage, please contact your agent, [Agent Name], at [Phone Number] or reply to this email.

Sincerely,

[Your Name/Department]  
[Insurance Company Name]  
[Phone Number]