[Date]

[Client Name]
[Client Address]
[City, State, Zip Code]

Subject: Annual Insurance Account Review - [Policy Number/Account Name]

Dear [Client Name],

It is time for your annual insurance account review. This yearly check-in ensures that your current coverage still aligns with your needs and that you are receiving all eligible discounts.

Major life changes-such as home renovations, a new vehicle, changes in marital status, or a new business venture-can impact your insurance requirements. We want to make sure there are no gaps in your protection.

Please contact our office at [Phone Number] or email us at [Email Address] to schedule a brief appointment. We can conduct this review over the phone or in person at your convenience.

We value your continued business and look forward to speaking with you soon.

Sincerely,

[Agent Name]
[Agency Name]
[Phone Number]