[Date]

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

Subject: Annual Review of Your Commercial Insurance Portfolio

Dear [Client Contact Name],

As part of our commitment to ensuring your business remains properly protected, it is time for your Annual Account Review. This meeting allows us to evaluate your current coverage, discuss any changes in your business operations over the past year, and identify potential gaps or opportunities for premium savings.

We would like to schedule a brief meeting or call to review the following:

- Current policy limits and deductibles
- Changes in business assets, locations, or payroll
- New services or products launched
- Upcoming renewal terms and market trends

Please let us know which of the following times work best for you:

- [Option 1: Date and Time]
- [Option 2: Date and Time]
- [Option 3: Date and Time]

If these times are not convenient, please suggest an alternative that fits your schedule. We look forward to speaking with you and ensuring your business continues to have the most effective coverage in place.

Sincerely,

[Your Name]
[Your Title]
[Agency Name]
[Phone Number]
[Email Address]