[Date]

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

Subject: Annual Review of Your Personal Insurance Coverage

Dear [Client Name],

Thank you for choosing [Agency Name] for your insurance needs. We appreciate your continued trust in us.

As your insurance needs change over time, we recommend an annual review of your policies. This ensures your coverage levels are up to date and that you are receiving all available discounts. During this brief review, we will look at your home, auto, and umbrella policies to identify any gaps or potential savings.

Please contact our office at your earliest convenience to schedule a time for your review. You can reach us by:

- Phone: [Phone Number]
- Email: [Email Address]
- Online Booking: [Link to Calendar/Website]

If you have had any major life changes recently-such as buying a new vehicle, remodeling your home, or starting a home-based business-please let us know during our call.

We look forward to speaking with you soon.

Sincerely,

[Agent Name]
[Agency Name]