[Date]

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

Subject: Annual Review of Your Life Insurance Policy - [Policy Number]

Dear [Client Name],

I am writing to schedule your annual life insurance account review. This meeting is a vital part of ensuring that your current coverage continues to meet your financial goals and protects your loved ones effectively.

Life changes such as marriage, the birth of a child, a new home, or retirement can significantly impact your insurance needs. During this brief review, we will:

- Verify beneficiary designations.
- Evaluate current coverage amounts against your needs.
- Review any updates to policy features or riders.
- Discuss any changes in your financial situation.

Please contact my office at [Phone Number] or reply to this email at [Email Address] to find a time that works best for you. We can meet in person, via video call, or over the phone.

Thank you for your continued trust. I look forward to speaking with you soon.

Sincerely,

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