[Company Name]
[Company Address]
[City, State, Zip Code]
[Phone Number]

[Date]

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

Subject: Scheduling Your Annual Insurance Account Review

Dear [Policyholder Name],

We hope you are doing well. Following your recent claim on policy number [Policy Number], we would like to schedule your annual account review. This meeting is designed to ensure your coverage remains adequate and to discuss any changes to your insurance needs.

During this review, we will:

- Evaluate your current coverage levels and deductibles.
- Review the status of your recent claim and any related premium adjustments.
- Identify any new discounts for which you may be eligible.
- Update your contact and billing information.

Please contact our office at [Phone Number] or email us at [Email Address] to schedule a time that works best for you. We offer appointments via phone, video call, or in person at our office.

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

Sincerely,

[Agent Name]
[Title]
[Company Name]