

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Subject: Invitation for Your Annual Insurance Portfolio Review

Dear [Client Name],

I hope this letter finds you well. As part of my commitment to providing you with the best possible protection, I would like to invite you to schedule your annual insurance portfolio review.

Life changes quickly, and it is important to ensure that your current coverage still aligns with your personal and financial goals. During this brief meeting, we will:

- Review your existing policies and coverage limits.
- Identify any gaps in your protection based on recent life events (e.g., marriage, new home, career changes).
- Discuss potential discounts or new options available to you.
- Ensure your beneficiary designations are up to date.

I have blocked off time over the next two weeks for these reviews. Please contact my office at [Phone Number] or reply to this email at [Email Address] to schedule a time that is convenient for you. We can meet in person, over the phone, or via video conference.

Thank you for your continued trust in [Agency/Company Name]. I look forward to connecting with you soon.

Best regards,

[Agent Name]

[Title]

[Agency Name]

[Phone Number]