

[Your Name/Agency Name]
[Address]
[City, State, Zip Code]
[Phone Number]
[Email Address]

[Date]

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

Subject: Annual Insurance Policy Review - [Policy Number/Type]

Dear [Client Name],

I hope this letter finds you well. It is time for your standard annual insurance policy review.

The purpose of this review is to ensure that your current coverage still aligns with your needs. Life changes such as home renovations, new purchases, or changes in your family dynamic can significantly impact your insurance requirements. We want to ensure you have the right protection at the best possible rate.

Please contact our office at [Phone Number] or reply to this email to schedule a brief meeting. We can conduct this review in person, over the phone, or via a video call at your convenience.

During the review, we will discuss:

- Any major life or property changes in the past year.
- Current policy limits and deductibles.
- Eligibility for new discounts or updated programs.
- Any questions you may have regarding your coverage.

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

Sincerely,

[Your Name]
[Title]
[Agency Name]