

[Date]

[Policyholder Name]

[Address Line 1]

[Address Line 2]

[City, State, Zip Code]

Subject: FIRST NOTICE: Annual Review of Your Insurance Coverage

Dear [Policyholder Name],

Thank you for choosing [Insurance Agency/Company Name] for your protection needs. We appreciate your continued business.

As your policy renewal date approaches, we would like to conduct your annual insurance review. Life changes often impact your coverage needs, and we want to ensure you are properly protected while receiving all eligible discounts.

Please contact our office at your earliest convenience to discuss any changes over the past year, such as:

- Home renovations or major purchases
- Changes in household members or marital status
- New security or safety systems
- Changes in vehicle usage or mileage
- Updates to your business operations (if applicable)

Our goal is to ensure there are no gaps in your coverage and that your premiums remain competitive. You can reach us by phone at [Phone Number] or by email at [Email Address] to schedule a brief 10-minute review.

We look forward to speaking with you soon.

Sincerely,

[Agent Name]

[Title]

[Insurance Agency/Company Name]