

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

[Date]

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

**Subject: Annual Insurance Policy Review - [Policy Number/Business Name]**

Dear [Client Contact Name],

As your insurance partner, we appreciate the opportunity to protect [Business Name]. Your current insurance program is approaching its renewal date on [Renewal Date].

To ensure your coverage keeps pace with your business growth and evolving risks, we would like to schedule a brief annual review. This meeting allows us to discuss:

- Changes in operations, services, or products.
- Updates to payroll, annual revenue, or inventory values.
- New equipment purchases or property improvements.
- Staffing changes or new contractual requirements.
- Potential gaps in coverage such as Cyber Liability or Employment Practices Liability.

Please let us know your availability for a brief phone call or meeting during the week of [Date]. Alternatively, you may contact our office at [Phone Number] or [Email Address] at your earliest convenience.

We look forward to reviewing your portfolio and ensuring you have the most competitive rates and comprehensive protection available.

Sincerely,

[Agent Name]  
[Title]  
[Agency Name]