

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Subject: Annual Review of Your Life Insurance Policy - [Policy Number]

Dear [Client Name],

I hope this letter finds you well. As part of my commitment to providing you with the best possible service, it is time for our annual review of your life insurance coverage.

Life changes such as marriage, the birth of a child, a new home, or changes in employment can significantly impact your financial needs. An annual review ensures that your current policy still aligns with your long-term goals and that your beneficiary designations remain up to date.

I would like to schedule a brief 15 to 20-minute meeting to discuss:

- Any major life changes over the past year.
- Reviewing your current coverage amounts and policy performance.
- Confirming your beneficiary information.
- Addressing any questions or concerns you may have.

Please contact my office at [Phone Number] or reply to this email at [Email Address] to let me know a date and time that works best for you. We can meet in person, over the phone, or via a video call.

Thank you for your continued trust in me for your insurance needs. I look forward to speaking with you soon.

Sincerely,

[Agent Name]

[Agency Name]

[Phone Number]

[Website]