

[Date]

[Policyholder Name]

[Business Name]

[Street Address]

[City, State, Zip Code]

Subject: Annual Review of Your Business Insurance Portfolio - Policy #[Policy Number]

Dear [Client Name],

It is time for the annual review of your business insurance coverage. As your business grows and evolves, it is important to ensure that your current policies still provide adequate protection against potential risks.

To help us assess your needs, please consider if any of the following changes occurred in the last 12 months:

- Changes in business operations or new services offered.
- Purchase of new equipment, machinery, or technology.
- Changes in the number of employees or payroll.
- Physical moves, renovations, or the acquisition of new property.
- Significant changes in annual gross revenue.
- New contracts or partnerships requiring specific insurance limits.

I would like to schedule a brief meeting or phone call to discuss these updates and review your upcoming renewal options. Please let me know your availability for a call during the week of [Date].

If you prefer, you can also reach me directly at [Phone Number] or [Email Address].

Thank you for choosing [Agency/Company Name] to protect your business. I look forward to speaking with you soon.

Sincerely,

[Your Name]

[Your Title]

[Agency Name]