

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Subject: Schedule Your Annual Comprehensive Insurance Policy Review

Dear [Client Name],

At [Agency Name], we want to ensure that your insurance coverage continues to meet your evolving needs. As your policy renewal date approaches, it is time for your Comprehensive Annual Insurance Policy Review.

The purpose of this review is to:

- Identify any changes in your life or business that may affect your risk.
- Ensure you are receiving all eligible discounts and credits.
- Review your current limits to prevent underinsurance or overinsurance.
- Update your contact information and beneficiary designations.

Please contact our office by [Date] to schedule a brief appointment. We can conduct this review via telephone, video conference, or in person at our office.

To prepare for our meeting, please consider if you have experienced any of the following in the past year:

- Home renovations or major purchases.
- Changes in marital status or household members.
- Purchase or sale of vehicles or property.
- Starting a new business or changing employment.

You can schedule your review by calling us at [Phone Number] or by emailing [Email Address].

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

Sincerely,

[Agent Name]

[Title]

[Agency Name]