

[Your Company Name]
[Your Company Address]
[City, State, Zip Code]
[Date]

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

Subject: Policy Anniversary Acknowledgment - Policy #[Policy Number]

Dear [Client Name],

We are pleased to congratulate you on the anniversary of your insurance policy with [Your Company Name]. We appreciate the trust you have placed in us to protect what matters most to you.

This anniversary is an excellent time to review your current coverage to ensure it still aligns with your needs. If you have experienced any major life changes over the past year-such as moving, marriage, or new purchases-please let us know so we can update your protection accordingly.

Enclosed you will find a summary of your current policy benefits for your records. No action is required at this time if your details remain the same.

Thank you for being a valued client. We look forward to continuing our relationship and serving your insurance needs for many years to come.

Sincerely,

[Agent Name/Signature]
[Title]
[Phone Number]
[Email Address]