

[Date]

[Policyholder Name]

[Street Address]

[City, State, Zip Code]

Subject: Annual Policy Bundle Courtesy Evaluation - [Account Number]

Dear [Policyholder Name],

Thank you for choosing [Company Name] for your insurance needs. We are writing to provide your complimentary annual evaluation of your current policy bundle.

The purpose of this review is to ensure your coverage still aligns with your lifestyle and to confirm you are receiving all eligible discounts. Based on our preliminary review, your bundle currently includes:

- [Policy Type 1, e.g., Homeowners Insurance]
- [Policy Type 2, e.g., Auto Insurance]
- [Policy Type 3, e.g., Umbrella Policy]

Evaluation Summary:

Our records indicate that you are currently receiving a [Percentage]% multi-policy discount. However, you may be eligible for additional savings or updated coverage limits based on recent changes in market rates or life events (such as home renovations, a new vehicle, or changes in household members).

Next Steps:

We recommend a brief 10-minute consultation to finalize this evaluation. During this call, we will:

- Verify that your asset protection is adequate.
- Check for new loyalty or safety discounts.
- Adjust deductibles to lower your monthly premiums if desired.

Please contact your agent, [Agent Name], at [Phone Number] or reply to this email to schedule your review.

We appreciate your continued trust in us.

Sincerely,

[Sender Name]
[Title]
[Company Name]