

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Subject: Courtesy Evaluation: Consolidation of Your Insurance Policies

Dear [Client Name],

Thank you for choosing [Company Name] for your insurance needs. We are currently conducting courtesy evaluations for our valued clients to ensure your coverage is both comprehensive and cost-effective.

Upon reviewing your file, we noticed that you currently hold multiple active policies with us. We would like to offer you a complimentary consolidation evaluation. Combining these policies under a single portfolio may provide several benefits, including:

- Potential multi-policy premium discounts
- Elimination of coverage overlaps or gaps
- Simplified billing with a single renewal date
- Streamlined account management

This evaluation is strictly a courtesy service to ensure your current insurance structure aligns with your financial goals. There is no obligation to make changes.

If you are interested in reviewing your consolidation options, please contact me directly at [Phone Number] or [Email Address] to schedule a brief 10-minute consultation.

We appreciate your continued trust in our services.

Sincerely,

[Agent Name]

[Title]

[Company Name]