

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Subject: Courtesy Evaluation: Potential Savings via Policy Bundling

Dear [Client Name],

Thank you for choosing [Agency Name] for your insurance needs. We are currently conducting courtesy reviews for our valued policyholders to ensure you are receiving the most comprehensive coverage at the most competitive rates.

While reviewing your file, we noted that your [Policy Type, e.g., Auto] insurance is currently held with us, but your [Policy Type, e.g., Homeowners] insurance is placed elsewhere. By bundling these policies together, you may be eligible for a multi-policy discount that could significantly lower your total premiums.

**Benefits of bundling include:**

- Significant premium discounts on both policies.
- A single point of contact for all claims and inquiries.
- Simplified account management and billing.
- Elimination of coverage gaps between separate providers.

This evaluation is provided as a courtesy and carries no obligation. If you would like us to provide a side-by-side comparison to see how much you could save, please contact our office at [Phone Number] or reply to this email.

We appreciate your business and look forward to helping you protect what matters most.

Sincerely,

[Agent Name]

[Title]

[Agency Name]

[Email Address]

[Phone Number]