

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Subject: Insurance Portfolio Bundle Evaluation

Dear [Client Name],

We have completed a comprehensive evaluation of your current insurance portfolio to identify opportunities for bundling and coverage optimization. By consolidating your policies, we aim to enhance your protection while reducing your total premium costs.

### **Current Portfolio Overview:**

- Policy 1: [Current Policy Name/Provider]
- Policy 2: [Current Policy Name/Provider]
- Policy 3: [Current Policy Name/Provider]

### **Evaluation Findings:**

Based on our analysis, we recommend bundling your [List Policies, e.g., Home, Auto, and Umbrella] insurance. This adjustment provides the following benefits:

- **Multi-Policy Discount:** Estimated annual savings of [Amount/Percentage].
- **Simplified Billing:** One renewal date and one consolidated statement.
- **Gap Elimination:** Ensuring consistent liability limits across all platforms.

### **Next Steps:**

Attached is a formal quote reflecting the bundled pricing. Please review these documents and let us know if you would like to proceed with the consolidation or if you have any questions regarding the adjusted coverage limits.

We look forward to discussing this evaluation with you.

Sincerely,

[Agent Name]

[Agency Name]

[Phone Number]

[Email Address]