

[Agency Name]
[Agency Address]
[City, State, Zip Code]
[Phone Number]
[Email Address]

[Date]

[Owner Name]
[Mailing Address]
[City, State, Zip Code]

Re: Welcome and Insurance Coverage Review for [Property Address]

Dear [Owner Name],

Congratulations on your new property! We are pleased to welcome you as a client of [Agency Name]. We look forward to providing you with the service and protection you need for your new investment.

To ensure your property is fully protected, we have scheduled a preliminary review of your current policy. Below are the initial coverage details we have on file:

- **Policy Number:** [Policy Number]
- **Carrier:** [Insurance Company Name]
- **Effective Date:** [Start Date]
- **Dwelling Limit:** \$[Amount]
- **Liability Limit:** \$[Amount]
- **Deductible:** \$[Amount]

We recommend a brief meeting or phone call to conduct a comprehensive coverage review. During this review, we will discuss:

- Replacement cost valuations to ensure you are not underinsured.
- Additional living expense or loss of rent coverage.
- Potential discounts for security systems or property upgrades.
- Liability protection and optional umbrella policies.

Please contact our office at [Phone Number] or reply to this email to schedule a time that works best for you. Our goal is to ensure you have total peace of mind regarding your new property.

Welcome to the neighborhood, and thank you for choosing [Agency Name].

Sincerely,

[Agent Name]
[Title]