[Your Name/Company Name]
[Your Address]
[City, State, Zip Code]
[Phone Number]
[Email Address]

[Date]

[Recipient Name]
[Recipient Address]
[City, State, Zip Code]

Subject: Annual Review of Your Insurance Coverage - Policy #[Policy Number]

Dear [Recipient Name],

I hope you are doing well. I am writing to schedule a brief check-in to review your current insurance coverage and ensure it still aligns with your needs.

As life changes, so do your insurance requirements. We recommend reviewing your policy if you have experienced any of the following recently:

- Purchased a new home or completed renovations
- Changed your marital status
- Added a new member to your family
- Started a business or changed your employment status
- Acquired high-value items (jewelry, electronics, art)

Our goal is to make sure you have the right amount of protection without paying for coverage you no longer need. This review will take approximately 15 minutes of your time.

Please let me know if you are available for a brief phone call on [Date] at [Time], or feel free to suggest a time that works better for your schedule.

Thank you for choosing [Company Name] for your insurance needs. I look forward to speaking with you soon.

Best regards,

[Your Signature]
[Your Printed Name]
[Your Job Title]