

[Date]

[Client Name]

[Client Company Name]

[Client Address]

[City, State, Zip Code]

Dear [Client Name],

Congratulations on celebrating your [Number] anniversary! Reaching this milestone is a testament to your hard work and the strength of [Client Company Name].

As your business evolves, your insurance needs may change. This anniversary is an excellent time to ensure your current commercial coverage still aligns with your operations and future goals. We are proud to have supported your growth and remain committed to protecting what you have built.

To celebrate this occasion, I would like to offer a complimentary review of your policy portfolio to identify any potential gaps or opportunities for premium savings. Please let me know if you would like to schedule a brief call next week.

Wishing you continued success in the years to come.

Sincerely,

[Your Name]

[Your Title]

[Insurance Agency Name]

[Phone Number]

[Email Address]