

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

[Date]

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

Subject: Anniversary Check-In: Reviewing Your Coverage Since [Event Name]

Dear [Client Name],

It has been one year since your [Life Event - e.g., Marriage, New Home Purchase, Birth of Child]. We wanted to reach out and congratulate you on this milestone anniversary!

Significant life changes often mean that your insurance needs have evolved as well. We want to ensure that your current policies still provide the best possible protection for your updated circumstances. Specifically, we should review:

- Coverage limits and whether they reflect your current assets.
- Beneficiary designations.
- Potential discounts for which you may now be eligible.
- Any new risks or assets acquired over the past year.

Are you available for a brief 10-minute phone call or a meeting next week to review your account? Please let us know a time that works best for you, or feel free to call us at [Phone Number].

We value your continued trust and look forward to speaking with you soon.

Best regards,

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