

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Dear [Client Name],

Welcome to [Insurance Agency Name]! Thank you for choosing me as your dedicated insurance agent. I am honored to help protect what matters most to you.

My goal is to provide you with personalized service and peace of mind. Whether you have questions about your current policy, need to file a claim, or want to explore additional coverage options, I am here to assist you every step of the way.

Your Policy Details:

Policy Type: [Policy Type]

Policy Number: [Policy Number]

Effective Date: [Effective Date]

I have enclosed your digital ID cards and policy summary for your records. I recommend reviewing these documents and contacting me if any adjustments are needed.

If you need to reach me, please use the contact information below:

Phone: [Phone Number]

Email: [Email Address]

Office Hours: [Office Hours]

I look forward to a long and successful relationship. Welcome to the family!

Sincerely,

[Agent Signature]

[Agent Name]

[Insurance Agency Name]