

[Date]

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

Subject: Your Dedicated Commercial Insurance Agent

Dear [Client Name],

I am writing to officially introduce myself as your dedicated Commercial Insurance Agent at [Agency Name]. My goal is to ensure that [Client Company Name] has the most comprehensive and cost-effective protection available.

As your primary point of contact, I am here to assist you with:

- Annual policy reviews and renewals
- Risk assessment and coverage gaps
- Certificate of Insurance (COI) requests
- Claims assistance and advocacy
- Updates to your business operations

I have reviewed your current portfolio and would like to schedule a brief 10-minute introductory call to learn more about your upcoming business goals for the year. Please let me know if [Day of Week] at [Time] works for you, or feel free to suggest an alternative.

I look forward to protecting your business and building a long-term partnership.

Sincerely,

[Agent Name]
[Title]
[Phone Number]
[Email Address]
[Website]