

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Subject: Annual Review of Your Insurance Portfolio

Dear [Client Name],

I hope this letter finds you well. As your dedicated insurance agent, my goal is to ensure that your coverage continues to provide the protection you need as your life and circumstances change.

It has been a year since we last reviewed your policies. I would like to schedule a brief annual review to discuss any updates in your life that might affect your insurance needs, such as:

- Home renovations or new purchases
- Changes in marital status or household members
- New business ventures or professional changes
- Changes in vehicle usage or new drivers
- Updates to your retirement or financial goals

Reviewing your portfolio annually helps us identify potential coverage gaps and ensures you are receiving all eligible discounts. This meeting can be conducted via phone, video call, or in person at your convenience.

Please contact my office at [Phone Number] or reply to this email at [Email Address] to schedule a time that works best for you. I look forward to connecting soon.

Thank you for your continued trust in my services.

Best regards,

[Agent Name]

[Agency Name]

[Phone Number]

[Website]