

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Subject: First Quarter Insurance Coverage Review

Dear [Client Name],

As we begin the first quarter of the year, I am reaching out to ensure that your insurance coverage still aligns with your current needs and life goals. The start of a new year is an excellent time to review your policies and account for any changes that occurred over the last few months.

Please consider if any of the following events have recently taken place:

- Major purchases or acquisitions (jewelry, art, electronics)
- Home renovations or improvements
- Changes in marital status or family size
- Employment changes or starting a new business
- Purchase of a new vehicle or recreational equipment

If any of these apply to you, or if you simply have questions about your current deductibles and limits, I would be happy to schedule a brief call or meeting to discuss your options.

Ensuring you have the right level of protection is my top priority. Please contact me at [Phone Number] or [Email Address] at your earliest convenience if you would like to conduct a formal review.

Thank you for your continued trust.

Sincerely,

[Your Name]

[Your Title]

[Agency Name]