

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Subject: Your Annual Policy Review and Our New Referral Program

Dear [Client Name],

I hope this letter finds you well. At [Company Name], we are committed to ensuring that your insurance coverage continues to meet your evolving needs. It is time for your **Annual Policy Review**.

A lot can change in a year. Whether you have renovated your home, purchased a new vehicle, or experienced a major life milestone, we want to make sure you have the right protection at the most competitive rate. Please contact us at [Phone Number] or [Email Address] to schedule a brief 15-minute review.

### **Introducing Our Referral Program**

The greatest compliment we can receive is a referral from a valued client like you. We are excited to introduce our new Referral Program to show our appreciation. For every friend, family member, or colleague you refer who completes a quote with us, we will [Insert Reward, e.g., send you a \$25 gift card / make a donation to charity].

There is no limit to how many rewards you can earn, and your referrals will receive the same high level of service you have come to expect from us.

Thank you for choosing [Company Name] for your insurance needs. We look forward to speaking with you soon.

Best regards,

[Your Name]

[Your Title]

[Company Name]

[Phone Number]

[Website]