[Date]

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

Subject: Schedule Your First Annual Policy Review - [Policy Number]

Dear [Client Name],

It has been nearly one year since we established your [Type of Insurance, e.g., Life/Home/Auto] insurance policy. I hope the past year has been a good one for you.

As part of our commitment to providing excellent service, it is time for your first Annual Policy Review. This brief meeting is designed to ensure that your coverage still aligns with your current needs. Over the last year, you may have experienced life changes-such as a new home, a change in marital status, or a new addition to the family-that could impact your protection requirements.

During our review, we will:

- Confirm your contact and beneficiary information.
- Review your current coverage levels and deductibles.
- Identify any new discounts or credits for which you may be eligible.
- Discuss any questions or concerns you have regarding your policy.

Please contact my office at [Phone Number] or email me at [Email Address] to schedule a time that is convenient for you. We can conduct this review over the phone or in person at my office.

Thank you for choosing [Agency Name]. I look forward to speaking with you soon.

Sincerely,

[Agent Name]
[Agent Title]
[Agency Name]