[Date]

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

Subject: Warm Welcome and Your First Annual Policy Review

Dear [Client Name],

It has been a pleasure having you as a client over the past year. We truly appreciate the trust you have placed in [Company Name] to handle your insurance needs.

As we approach the anniversary of your policy, we would like to conduct your first Annual Policy Review. Life changes quickly, and we want to ensure that your current coverage still aligns perfectly with your lifestyle, assets, and goals.

During this brief review, we will:

- Verify that your contact information is up to date.
- Review any major life changes (such as a new home, marriage, or career change).
- Identify any new discounts or credits you may be eligible for.
- Confirm that your coverage limits are still adequate.

Please contact our office at [Phone Number] or reply to this email to schedule a convenient time for a 15-minute phone call or in-person meeting. If we don't hear from you, a member of our team will reach out next week to follow up.

Thank you again for being a valued part of the [Company Name] family. We look forward to speaking with you soon.

Best regards,

[Your Name]
[Your Title]
[Company Name]