Subject: Invitation: Your First Annual Policy Review

Dear [Client Name],

It has been one year since we established your insurance coverage. To ensure your protection still aligns with your current lifestyle and goals, I would like to invite you to your **First Annual Policy Review**.

The purpose of this brief meeting is to:

- Update your personal information and beneficiaries.
- Review changes in your life over the past 12 months (marriage, new home, career changes, etc.).
- Identify potential discounts or gaps in coverage.
- Answer any questions you have regarding your policy.

Meeting Details:

Date: [Insert Date]
Time: [Insert Time]
Location/Method: [Insert Link or Office Address]

Please click the link below to confirm this time or to reschedule for a slot that works better for you:

Click Here to Schedule/Confirm

I look forward to connecting with you and ensuring your peace of mind for the year ahead.

Best regards,

[Your Name]
[Your Title]
[Company Name]
[Phone Number]