[Your Name/Agency Name]
[Address Line 1]
[City, State, Zip Code]
[Phone Number]
[Email]

[Date]

[Client Name]
[Client Address Line 1]
[City, State, Zip Code]

Dear [Client Name],

Thank you for choosing [Agency Name] for your insurance needs over the past year. We truly appreciate your trust and value the relationship we have built with you.

As we approach the one-year anniversary of your policy, it is time for your First Annual Policy Review. Our goal is to ensure that your coverage still aligns with your current lifestyle and that you are receiving all available discounts.

During this brief review, we will discuss:

- Any major life changes (new home, marriage, or career changes).
- Updates to your assets or property.
- Potential gaps in your current coverage.
- New discount opportunities or policy bundles.

Please contact our office at [Phone Number] or reply to this email to schedule a convenient time for your review. We can conduct this meeting over the phone, via video call, or in person.

Thank you again for being a loyal client. We look forward to protecting your future for many years to come.

Sincerely,

[Your Signature]
[Your Printed Name]
[Your Title]