[Date]

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

Subject: Your One-Year Policy Anniversary and Annual Review

Dear [Client Name],

Happy Anniversary! It has been one year since we began working together to manage your [Policy Type, e.g., Life/Home/Auto] insurance policy.

As you reach this milestone, it is the perfect time to review your current coverage. Life changes quickly, and we want to ensure your policy still aligns with your current needs, goals, and any life events that may have occurred over the past twelve months.

We would like to invite you for a brief annual review meeting to discuss:

- Any changes in your household or financial situation.
- Potential updates to your coverage limits.
- New discounts or policy options you may be eligible for.
- Answers to any questions you have regarding your protection.

Please contact our office at [Phone Number] or reply to this email to schedule a convenient time for a phone call or in-person appointment. We recommend completing this review by [Date].

Thank you for choosing [Company Name]. We look forward to continuing to serve you.

Sincerely,

[Agent Name]
[Title]
[Company Name]
[Phone Number]
[Email Address]