

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Subject: Welcome to [Company Name] - Electronic Policy Delivery and Portal Access

Dear [Client Name],

Welcome to [Company Name]! We are pleased to have you as a new client and thank you for choosing us for your insurance needs.

In our effort to provide you with fast and secure service, we have transitioned to electronic policy delivery. Your new policy documents for [Policy Type/Number] are now available for your review.

How to Access Your Documents:

You can access your policy, billing statements, and ID cards through our secure Client Portal. Please follow the steps below to get started:

1. Visit our portal at: [Portal URL]
2. Your temporary username is: [Username/Email]
3. Click on "First Time User" or "Reset Password" to create your unique password.
4. Once logged in, navigate to the "Documents" tab to view and download your policy.

Important Information:

- Please review your policy documents carefully to ensure all information is correct.
- Save a digital copy or print the documents for your records.
- If you prefer to receive paper copies via mail, please contact us at [Phone Number].

If you have any questions regarding your coverage or need technical assistance with the portal, please do not hesitate to reach out to your agent, [Agent Name], at [Agent Email] or [Agent Phone].

Thank you for your business.

Sincerely,

[Sender Name]

[Title]

[Company Name]