[Date]

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

RE: Delivery of Your Exclusive Private Client Policy - [Policy Number]

Dear [Client Name],

It is a privilege to present you with your formal insurance policy documents. As a valued Private Client, you have chosen a level of protection designed specifically for high-net-worth individuals, ensuring your assets and lifestyle are shielded with the highest degree of care.

Enclosed you will find:

- The Policy Declaration Page (Summary of coverage and limits)
- The Full Policy Wording and Endorsements
- Your Proof of Insurance/Identification Cards
- Contact information for your dedicated claims concierge

We recommend reviewing these documents to ensure the coverage limits align with your current requirements. Please note that as your portfolio evolves, we are available to provide bespoke risk assessments and adjustments to your coverage at your convenience.

Should you have any questions regarding your policy, or if you require assistance with any other private risk management matters, please contact your Personal Account Executive directly at [Phone Number] or [Email Address].

Thank you for entrusting [Agency/Company Name] with your protection. We look forward to providing you with continued excellence in service.

Sincerely,

[Signature]
[Name of Advisor/Executive]
[Title]
[Agency/Company Name]