[Date]

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

RE: Delivery of Private Wealth Policy - [Policy Number]

Dear [Client Name],

It is my pleasure to formally deliver your comprehensive Private Wealth insurance policy. This document represents a key component of your broader financial strategy, designed to provide sophisticated protection for your significant assets and legacy.

Enclosed in this package, you will find:

- The original Policy Contract and Schedule of Benefits.
- A summary of the customized coverage enhancements.
- The premium payment schedule and receipt of initial deposit.
- Contact information for your dedicated concierge claims team.

I recommend that you review these documents carefully and store them in a secure location. Please pay particular attention to the "Right to Examine" period, during which you may review the terms to ensure they align perfectly with your expectations.

We will schedule a brief follow-up call next week to address any questions you may have regarding the policy specifics or the digital access portal for your account.

Thank you for the continued trust you place in our firm. We remain committed to managing your risk with the highest level of discretion and expertise.

Sincerely,

[Advisor Signature]
[Advisor Name]
[Title]
[Firm Name]