[Date]

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

Dear [Client Name],

It is a pleasure to provide the enclosed insurance documentation for your personal insurance portfolio. We have carefully curated these policies to ensure your assets and lifestyle are protected with the high level of coverage they require.

Enclosed Documents:

- [Policy Type - e.g., High-Value Homeowners]
- [Policy Type - e.g., Personal Excess Liability/Umbrella]
- [Policy Type - e.g., Private Collection/Fine Arts]
- Insurance Identification Cards (if applicable)

Portfolio Highlights:

Your coverage has been tailored to include specific features discussed, such as [mention specific features like Guaranteed Replacement Cost, Cash Settlement Options, or Worldwide Coverage]. Please review the enclosed schedules to verify that all locations, vehicles, and scheduled items are listed accurately.

Our Commitment:

As your dedicated advisors, we are here to manage the complexities of your risk management. Should you acquire new assets, such as additional real estate, luxury vehicles, or collectibles, please notify us immediately so we may update your protection accordingly.

We will contact you shortly to confirm receipt and address any questions you may have. In the meantime, please do not hesitate to reach out to me directly at [Phone Number] or [Email Address].

Thank you for your continued trust and partnership.

Sincerely,

[Signature]
[Advisor Name]
[Title]
[Agency/Firm Name]