

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Subject: Welcome and Delivery of Your Term Life Insurance Policy - [Policy Number]

Dear [Client Name],

Thank you for choosing [Insurance Agency/Company Name] for your life insurance needs. We are pleased to formally welcome you as a new client and provide you with your enclosed Term Life Insurance policy document.

Please review your policy carefully to ensure all details are correct. This document outlines your coverage period, premium payment schedule, and the terms of your protection.

Beneficiary Confirmation

Based on your application, we have recorded the following individual(s) as your primary beneficiary(ies):

- **Name:** [Beneficiary Name 1] - [Percentage]%
- **Name:** [Beneficiary Name 2] - [Percentage]%

If there are any errors in the names listed above or if you wish to make changes to your beneficiary designations, please contact us immediately.

Next Steps

We recommend that you keep this policy in a safe place and inform your beneficiaries about the existence of this coverage. It is also important to review your coverage periodically, especially after major life events such as marriage, the birth of a child, or a change in financial status.

If you have any questions regarding your policy or need assistance with any other insurance matters, please reach out to me directly at [Phone Number] or [Email Address].

Thank you for trusting us to help protect your family's future.

Sincerely,

[Agent Name]

[Title]

[Company Name]