[Date]

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

Subject: Delivery of Your Legacy Planning Whole Life Insurance Policy - Policy #[Policy Number]

Dear [Client Name],

Thank you for choosing [Company Name] for your legacy planning needs. It is my privilege to deliver your formal Whole Life Insurance policy documents.

This policy is a cornerstone of your financial legacy. It is designed to provide a guaranteed death benefit for your beneficiaries and build cash value over time, ensuring that your loved ones are protected and your final wishes are honored.

Next Steps:

- **Review Your Policy:** Please examine the attached documents to verify that all personal information and beneficiary designations are correct.
- **Storage:** Keep these documents in a secure location, such as a fireproof safe or with your legal counsel, and inform your beneficiaries of their location.
- **Free Look Period:** You have a [Number]-day "Free Look" period from today to review the terms. If you are not completely satisfied, you may return the policy for a full refund of premiums paid.

I have enclosed a summary sheet highlighting your coverage amounts, premium schedule, and designated beneficiaries for quick reference.

If you have any questions regarding the riders, dividends, or the cash value accumulation of this policy, please contact me directly at [Phone Number] or [Email Address].

Thank you for the trust you have placed in us to help secure your family's future.

Sincerely,

[Agent Name]
[Title]
[Agency Name]