Subject: Annual Review: Key Person Business Continuity Coverage

Dear [Client Name],

As part of our commitment to your company's long-term financial stability, it is time for the annual review of your Key Person Business Continuity coverage.

The purpose of this review is to ensure that your current policy levels align with the current valuation of your business and the specific roles of your essential personnel. Over the past twelve months, changes in revenue, new leadership appointments, or expanded debt obligations may have impacted your coverage requirements.

During our brief review meeting, we will discuss:

- Current valuation of identified key employees.
- Potential gaps in your existing buy-sell or continuity agreements.
- Updates to beneficiary designations or ownership structures.
- Assessment of current premium costs versus market alternatives.

Please let us know if any of the following times work for a 15-minute phone or video consultation:

- [Date/Time 1]
- [Date/Time 2]
- [Date/Time 3]

Maintaining up-to-date protection is vital to ensuring your operations continue without interruption should an unexpected loss occur. We look forward to connecting with you soon.

Sincerely,

[Your Name]
[Your Title]
[Company Name]