

Subject: A recommendation for your financial security

Dear [Friend/Associate Name],

I am writing to you because I recently worked with [Agent Name] from [Company Name] to set up my life insurance policy, and I was extremely impressed with the service I received.

Finding the right life insurance can be overwhelming, but [Agent Name] made the process simple and transparent. They took the time to understand my family's specific needs and helped me find a plan that provides great coverage at a price I am comfortable with.

I value our relationship and wanted to share this resource with you. I believe [Agent Name] could be equally helpful in ensuring your family's future is protected.

You can reach [him/her/them] at:

Name: [Agent Name]

Phone: [Agent Phone Number]

Email: [Agent Email Address]

I have also copied [Agent Name] on this email so they can introduce themselves briefly. There is no obligation, but I highly recommend having a conversation with them.

Best regards,

[Your Name]

[Your Phone Number]