

Date: [Insert Date]

To: [Insurance Agent/Company Name]

From: [Name of Spouse 1] and [Name of Spouse 2]

Current Policy Number(s): [Policy Number 1] / [Policy Number 2]

Subject: Request for Newlywed Joint Policy Conversion and Referral

Dear [Agent Name],

We are writing to inform you that we were recently married on [Wedding Date]. As we begin our life together, we would like to consolidate our individual insurance coverages into a joint policy to streamline our premiums and take advantage of any multi-policy or marital discounts available within your network.

Specifically, we are interested in combining the following:

- Auto Insurance
- Homeowners/Renters Insurance
- Life Insurance

Please review our current standing and provide us with a quote for a comprehensive joint bundle. Additionally, if there are specific departments or specialized agents within your network that handle high-value joint assets, please consider this a formal request for a referral to the appropriate representative.

We would appreciate it if you could contact us at [Phone Number] or [Email Address] to discuss the necessary steps for this transition and what documentation (such as a marriage certificate) is required.

Thank you for your assistance in protecting our new family.

Sincerely,

[Signature of Spouse 1]

[Printed Name of Spouse 1]

[Signature of Spouse 2]

[Printed Name of Spouse 2]