

POLICY MANAGEMENT:

Sample Letter and Email Verbiage

CLIENT LETTER/EMAIL

Dear [name],

I hope this message finds you well! As you know, life is a moving target. Situations change and often so do our priorities. When our priorities change, so do our needs.

One of the services I provide to my clients and their friends is a full, free, life insurance policy review. The life insurance industry is an innovative industry and is continually evolving with new products that are both more efficient and provide additional benefits to you and your family. If you have experienced any of the following life events recently, then it may be time for a life insurance policy review:

- Marriage.
- Birth of child or grandchild.
- Job change.
- Home purchase or sale.
- Children entering college.
- Retirement.
- Changes to your business.

Interest rates and the economy are factors that can affect the performance of your life insurance as well.

If your personal or business situation is evolving or you would simply like to discuss some of the benefits of life insurance or other financial products, please contact me at your earliest convenience.

Best regards,

[your name]

[your title]

[your company]