

[Agency Name]
[Agency Address]
[City, State, Zip Code]
[Phone Number]
[Email Address]

[Date]

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

Subject: Important Information Regarding Life Insurance Policy #[Policy Number]

Dear [Beneficiary Name],

We are writing to formally notify you that you have been designated as a beneficiary for the life insurance policy held by [Policyholder Name] through [Insurance Company Name].

At [Agency Name], our role is to ensure that you have all the necessary information and support regarding this policy. While no action is required from you at this time, we want to introduce ourselves as your point of contact should you ever have questions regarding the status of this coverage or the eventual claims process.

Attached to this letter, you will find a summary of the policy details and our agency contact information. We recommend keeping these documents in a safe place along with your other vital records.

If you would like to schedule a brief call to review the policy details or if you need to update your contact information in our records, please feel free to reach out to us at [Phone Number] or [Email Address].

Thank you for choosing [Agency Name] to protect your family's future.

Sincerely,

[Agent Name]
[Title]
[Agency Name]