

[Date]

[Beneficiary Name]

[Address Line 1]

[Address Line 2]

Subject: Important Information Regarding Policy #[Policy Number]

Dear [Beneficiary Name],

Welcome to [Insurance Agency Name]. We are writing to officially introduce ourselves as the insurance agency for [Policyholder Name]. You have been designated as a beneficiary on their [Policy Type, e.g., Life Insurance] policy.

Our goal 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 you to know that we are here to assist your family with any questions or future needs.

Below is our contact information for your records:

- **Agency Name:** [Insurance Agency Name]
- **Agent Name:** [Agent Name]
- **Phone Number:** [Phone Number]
- **Email Address:** [Email Address]
- **Office Hours:** [Hours of Operation]

We have also enclosed a summary of the policy benefits and a digital business card for easy access to our services. Please keep this letter in a safe place along with other important family documents.

Thank you for trusting [Insurance Agency Name]. we look forward to serving you and your family for years to come.

Sincerely,

[Agent Signature]

[Agent Printed Name]

[Title]