

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

[Date]

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

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

Dear [Beneficiary Name],

We are writing to welcome you as a designated beneficiary for a life insurance policy held by [Policyholder Name] with [Agency Name].

Our role is to ensure that when the time comes, the transition of benefits is handled with care, transparency, and efficiency. As a future beneficiary, you do not need to take any action at this time. However, we believe it is important for you to know that we are here to support you and provide guidance on the steps involved in the claims process in the future.

What you should know:

- **Policy Details:** We maintain all records related to Policy #[Policy Number].
- **Our Commitment:** We are committed to providing a straightforward process for the distribution of funds according to the policyholder's wishes.
- **Contact Information:** Please keep our contact details on file. If you have any general questions about how life insurance benefits work, our team is available to assist you.

We recommend that you keep a copy of this letter with your important legal documents. If your contact information changes, please let us or the policyholder know so that our records remain accurate.

Thank you for trusting [Agency Name]. We look forward to being a reliable resource for you.

Sincerely,

[Agent Name/Signature]
[Title]
[Agency Name]