

[Date]

[Beneficiary Name]

[Address Line 1]

[Address Line 2]

[City, State, Zip Code]

Subject: Welcome to [Agency Name] - Important Policy Information

Dear [Beneficiary Name],

We are writing to officially welcome you as a designated beneficiary for a life insurance policy held with [Agency Name]. We understand that discussing life insurance can be a sensitive matter, but our goal is to ensure you are informed and supported regarding your status under policy number [Policy Number].

### **About Our Agency**

[Agency Name] has been providing comprehensive insurance solutions for [Number] years. We pride ourselves on transparency, reliability, and personalized service. Our mission is to provide peace of mind to our clients and their loved ones through financial security and professional guidance.

### **What You Need to Know**

As a beneficiary, you are entitled to specific benefits under the terms of this policy. At this time, no immediate action is required from you. However, we recommend keeping this letter in a safe place along with your other important legal documents.

### **Our Services Include:**

- Dedicated claims assistance and processing.
- Financial planning resources.
- Direct access to licensed insurance advisors.
- Regular policy updates and notifications.

If you have any questions regarding this policy or if you would like to update your contact information, please do not hesitate to reach out to us. Our office is open [Hours of Operation] and can be reached via the contact details below.

Thank you for trusting [Agency Name]. We look forward to serving you.

Sincerely,

[Agent Name/Signature]

[Title]

[Agency Name]  
[Phone Number]  
[Email Address]  
[Website]