

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Subject: Notification of Broker of Record Change and Welcome

Dear [Client Name],

We are writing to formally notify you that, effective [Date], [New Brokerage Name] has been appointed as your new Broker of Record for your [Type of Policy, e.g., Commercial General Liability] insurance policies.

This transition follows the recent [merger/acquisition/appointment] between [Previous Brokerage Name] and [New Brokerage Name]. Our primary goal is to ensure a seamless transition while continuing to provide the high level of service and expertise you expect.

What this means for you:

- **Policy Coverage:** Your current insurance coverage, terms, and premiums remain unchanged.
- **Point of Contact:** Your new dedicated account manager is [Account Manager Name], who can be reached at [Phone Number] or [Email Address].
- **Claims and Inquiries:** Please direct all future service requests, policy changes, and claim reporting to our office.

We are excited to welcome you to [New Brokerage Name]. Over the coming weeks, a member of our team will reach out to introduce themselves personally and review your current portfolio to ensure it still meets your evolving needs.

If you have any immediate questions regarding this transition, please do not hesitate to contact us.

Sincerely,

[Your Name]

[Your Title]

[New Brokerage Name]

[Phone Number]

[Website]