

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Subject: Welcome to [New Brokerage Name] - Notification of Broker of Record Change

Dear [Client Name],

We are pleased to formally welcome you to [New Brokerage Name]. This letter serves as official confirmation that the Broker of Record (BOR) change for your [Policy Type, e.g., General Liability/Health Insurance] policies has been successfully processed.

Effective [Effective Date], [New Brokerage Name] is now authorized to represent your interests with your insurance carriers. Please be assured that this change does not alter your current coverage, premiums, or policy terms. Your existing policies remain fully in force.

As your new dedicated brokerage team, we are committed to providing you with proactive service and strategic risk management. Our immediate priorities include:

- Conducting a comprehensive review of your current portfolio.
- Identifying potential gaps in coverage or opportunities for cost savings.
- Serving as your primary point of contact for all renewals, endorsements, and claims support.

Your account will be managed by [Account Manager Name], who can be reached directly at [Phone Number] or via email at [Email Address].

We look forward to a long and successful partnership. A member of our team will reach out shortly to schedule a brief introductory meeting.

Sincerely,

[Your Name]

[Your Title]

[New Brokerage Name]