

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Subject: Formal Notification of Broker of Record Appointment

Dear [Client Contact Name],

Thank you for choosing [Brokerage Name] as your new Broker of Record. We are pleased to formally welcome you and look forward to managing your insurance and risk management needs.

As your appointed Broker of Record, our primary responsibilities include:

- Reviewing and managing your current policy portfolio.
- Acting as your primary liaison with insurance carriers.
- Negotiating premiums and coverage terms on your behalf.
- Assisting with claims processing and advocacy.
- Providing ongoing risk assessment and advisory services.

We are currently in the process of transitioning your files to our office. During this period, there will be no interruption to your existing coverage. We will contact you shortly to schedule a comprehensive review of your current policies and to discuss your objectives for the upcoming year.

In the meantime, please direct all future insurance inquiries, certificates of insurance requests, or policy change notifications to our service team at:

Primary Contact: [Account Manager Name]

Phone: [Phone Number]

Email: [Email Address]

We appreciate the trust you have placed in [Brokerage Name] and are committed to providing you with exceptional service.

Sincerely,

[Your Name]

[Your Title]

[Brokerage Name]