

Subject: Welcome & Next Steps: Your Broker of Record Transfer for [Company Name]

Dear [Client Name],

Welcome! We are pleased to confirm that the Broker of Record (BOR) transfer process for your account has been successfully initiated. We are excited to begin our partnership and serve as your dedicated insurance advisor.

To ensure a smooth transition, here are the next steps in our onboarding process:

- **Carrier Notification:** We have notified your insurance carriers of the change. This process typically takes [Number] business days to be officially recognized in their systems.
- **Policy Audit:** Our team is currently reviewing your existing policies to identify any immediate gaps in coverage or opportunities for cost savings.
- **Introductory Call:** We would like to schedule a brief 15-minute call on [Date/Time] to discuss your specific goals for the upcoming year.
- **Point of Contact:** Moving forward, please direct all certificates of insurance (COI) requests, claims notifications, and billing inquiries to [Account Manager Name] at [Email Address].

You do not need to take any further action at this time. We will provide a status update once the carriers have completed the transfer on their end.

If you have any immediate questions, please feel free to reach out to us at [Phone Number].

Best regards,

[Your Name]
[Your Title]
[Agency Name]