

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Subject: Official Notification of Broker of Record Transfer

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) transfer for your [Type of Insurance/Account, e.g., General Liability] policy has been successfully processed.

Effective as of [Effective Date], [New Brokerage Name] is now authorized to represent your interests and manage your insurance portfolio. We have notified your carriers of this change to ensure a seamless transition of your records.

What this means for you:

- **Dedicated Support:** Your new primary point of contact is [Account Manager Name], who can be reached at [Phone Number] or [Email Address].
- **Policy Management:** We will now handle all renewals, endorsements, and certificates of insurance on your behalf.
- **Claims Advocacy:** In the event of a loss, our team will act as your advocate to ensure fair and timely processing by the carrier.

Our team is currently conducting a comprehensive review of your existing coverage to identify any potential gaps or opportunities for cost savings. We will contact you shortly to discuss our findings and align on your goals for the coming year.

Thank you for choosing [New Brokerage Name]. We look forward to a successful partnership.

Sincerely,

[Your Name]

[Your Title]

[New Brokerage Name]

[Contact Information]