

[Date]

[Client Name]
[Client Address]
[City, State, Zip]

Dear [Client Name],

Subject: Important Update Regarding Your Insurance Representation

We are writing to officially welcome you to [New Brokerage Name]. We are pleased to inform you that, effective [Date], [Agent Name] and the team at [New Brokerage Name] have been appointed as your new Broker of Record for your [Policy Type, e.g., Commercial General Liability] insurance program.

What This Means for You

Our primary goal is to ensure a seamless transition with no interruption to your coverage. While your insurance carrier and policy terms remain exactly the same, you now have the full support, resources, and advocacy of our firm.

Benefits of the Transition

As your new representative, we provide:

- Dedicated account management and personalized service.
- Comprehensive policy reviews to identify potential savings or coverage gaps.
- Expert claims advocacy and risk management consulting.

Next Steps

You do not need to take any action at this time. We have already coordinated with your insurance carriers to update our records. We will be reaching out to you shortly to schedule a brief introductory call to review your current objectives and ensure your insurance program aligns with your goals.

If you have any immediate questions or need assistance with a certificate of insurance or a claim, please contact us at [Phone Number] or [Email Address].

Thank you for your trust. We look forward to a long and successful partnership.

Sincerely,

[Your Name]
[Your Title]
[New Brokerage Name]