

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Subject: Important Update Regarding Your Insurance Account

Dear [Client Name],

We are pleased to formally welcome you to [Your Agency Name]. Effective [Effective Date], we have been designated as your new Broker of Record for your [Policy Type, e.g., Health/Commercial/General Liability] insurance coverage.

This transfer occurred following [Reason for Transfer, e.g., the acquisition of ABC Agency / your recent request]. We want to assure you that this change will not result in any gaps in your current insurance coverage. Your policies, premiums, and benefits remain exactly as they are currently written.

What this means for you:

- **Service:** Our team is now responsible for managing your account, assisting with claims, and answering any billing questions.
- **Policy Management:** We will handle your upcoming renewals to ensure you continue to receive the best possible rates and coverage.
- **Expert Advice:** You now have access to our full suite of risk management resources and dedicated support staff.

Your new primary point of contact is [Account Manager Name], who can be reached directly at [Phone Number] or [Email Address].

We are currently reviewing your file to ensure everything is up to date. We will reach out to you shortly to introduce ourselves personally and discuss any upcoming insurance needs you may have.

Thank you for the opportunity to serve you. We look forward to a long and successful partnership.

Sincerely,

[Your Name]

[Your Title]

[Your Agency Name]

[Your Website]