

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Dear [Client Name],

Welcome to [Advisory Firm Name]. Thank you for choosing us as your private insurance advisors. We are committed to protecting your assets and providing you with personalized risk management solutions.

As your dedicated advisory team, our goal is to ensure your insurance portfolio is optimized for your specific needs. We are currently reviewing your files and will reach out shortly to schedule a comprehensive strategy session.

In the meantime, your primary point of contact is:

- **Advisor Name:** [Advisor Name]
- **Phone:** [Phone Number]
- **Email:** [Email Address]

If you have any immediate questions or updates regarding your current coverage, please do not hesitate to contact us.

We look forward to a long and successful partnership.

Best regards,

[Your Name]

[Your Title]

[Advisory Firm Name]