

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Subject: Next Steps for Your Umbrella Insurance Policy

Dear [Client Name],

Thank you for choosing [Agency Name] for your liability protection. To complete the setup of your new Umbrella Policy (Policy #[Policy Number]), please review the following next steps:

1. Review Your Coverage Limits

Please verify that the underlying liability limits on your auto and homeowners policies meet the minimum requirements required by the umbrella carrier. If your underlying limits are too low, your umbrella coverage may not activate in the event of a claim.

2. Sign and Return Documents

Attached you will find the application and the Uninsured/Underinsured Motorist selection form. Please sign and return these by [Date] via [Email/Portal/Mail].

3. List All Household Members

Ensure that all licensed drivers in your household are listed on your primary auto policy. The umbrella policy extends over these drivers, so accuracy is essential for valid coverage.

4. Payment Information

If you have not already set up your payment plan, please [visit our website / call our office] to finalize your premium payment. Your coverage will officially begin on [Effective Date].

If you have any questions regarding these requirements or your new policy, please contact me directly at [Phone Number] or [Email].

Sincerely,

[Agent Name]

[Agency Name]

[Phone Number]