

[Date]

[Client Name]

[Client Business Name]

[Client Address]

[City, State, Zip]

Subject: Welcome to [Agency Name] - Commercial Fleet Insurance Services

Dear [Client Contact Name],

On behalf of [Agency Name], I would like to personally welcome you to our agency. We are pleased that you have chosen us to manage your commercial fleet insurance needs and protect your business assets.

Our goal is to provide your company with proactive risk management and efficient service to keep your drivers safe and your vehicles on the road. Your policy details are summarized below:

- **Policy Number:** [Policy Number]
- **Carrier:** [Insurance Carrier Name]
- **Effective Date:** [Start Date]

Your Service Team:

Primary Agent: [Agent Name] - [Email] - [Phone]

Account Manager: [Manager Name] - [Email] - [Phone]

Fleet Management Reminders:

- **Certificates of Insurance:** To request a COI for your contracts, please contact [Email/Portal Link].
- **Adding/Removing Drivers:** Please submit driver MVRs to us for approval before allowing new employees to operate fleet vehicles.
- **Claims Reporting:** In the event of an accident, please call our claims department at [Phone Number] or the carrier directly at [Carrier Phone Number].

We will be reaching out shortly to schedule a brief review of your fleet safety protocols and to ensure you have all necessary ID cards and documentation.

Thank you for your business and your trust.

Sincerely,

[Your Name]

[Your Title]

[Agency Name]