

[Date]

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

Subject: Celebrating Your [Number]-Year Anniversary with [Company Name]

Dear [Client Name],

It is a privilege to celebrate a significant milestone with you. This month marks the [Number]-year anniversary of your term life insurance policy.

We want to take this moment to express our sincere appreciation for your continued trust. Choosing to protect your loved ones is one of the most important financial decisions a person can make, and we are honored that you have chosen us as your partner in that commitment.

As you approach your upcoming renewal on [Renewal Date], this is an excellent time to review your current coverage. Since your policy began, your life may have changed-perhaps through a new home, career advancement, or changes in your family structure. Ensuring your coverage still aligns with your goals is our top priority.

**Policy Details for Your Review:**

- Policy Number: [Policy Number]
- Current Coverage Amount: [Amount]
- Renewal Date: [Date]

I will reach out to you next week to briefly discuss your renewal options and ensure you are receiving all available benefits. However, if you would like to schedule a review sooner, please contact me at [Phone Number] or [Email Address].

Thank you again for your loyalty over the past [Number] years.

Best regards,

[Agent Name]  
[Title]  
[Company Name]