

[Date]

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

Dear [Client Name],

Welcome to [Insurance Agency Name]! Thank you for choosing us to protect your family's financial future. We are honored to have you as a policyholder and are committed to providing you with excellent service.

Your comprehensive life insurance policy is now active. Enclosed you will find your policy documents. Please review them carefully and store them in a secure location. This coverage ensures that your loved ones are protected and provides peace of mind for the years to come.

As your agent, I am here to help you navigate any life changes. Whether you experience a change in marital status, the birth of a child, or a new home purchase, we should review your coverage to ensure it remains aligned with your needs.

Share the Peace of Mind

Most of our clients find great comfort in knowing their families are secure. If you have friends or family members who could benefit from a professional financial review or life insurance protection, I would be privileged to assist them.

If you would like to refer someone, please provide their contact information below or have them reach out to me directly at [Phone Number]:

- Name: _____
- Relationship: _____
- Phone/Email: _____

Thank you again for your trust and your business.

Sincerely,

[Agent Name]
[Agent Title]
[Insurance Agency Name]
[Phone Number]
[Email Address]