

[Date]

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

Dear [Client Name],

Welcome to [Agency Name]! We are pleased that you have chosen us to handle your property and casualty insurance needs. We are committed to providing you with the best coverage and service possible.

As we finalize your [Home/Auto/Business] policies, we want to ensure your overall financial protection is complete. While we handle your property risks, we have found that many of our clients also have questions regarding life insurance, retirement planning, or disability coverage.

To provide you with a holistic approach to your security, I would like to introduce you to our trusted partner, [Partner Name/Financial Specialist], at [Company Name]. They specialize in [Life/Health/Financial] services and can provide a complimentary review of your current supplemental coverage.

I have asked [Partner Name] to reach out to you briefly next week to introduce themselves and see if they can be of assistance. Alternatively, if you would like to speak with them sooner, you can reach them directly at [Partner Phone Number].

Thank you again for trusting us with your insurance business. If you have any questions regarding your new policies, please do not hesitate to call me at [Your Phone Number].

Sincerely,

[Your Name]
[Your Title]
[Agency Name]