

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Dear [Client Name],

Thank you for choosing [Company Name] to assist with your long-term trust and life insurance needs. We are honored that you have placed your trust in us to help secure your legacy and provide financial protection for your loved ones.

Our commitment is to ensure that your estate planning goals are met with the highest level of care and professionalism. We understand the importance of these decisions, and we are dedicated to supporting you as your needs evolve over the years.

Enclosed, you will find copies of your executed documents and policy details for your records. We recommend keeping these in a safe place and sharing the location with your designated beneficiaries or trustees.

If you have any questions regarding your coverage or if you would like to review your plan in the future, please do not hesitate to contact me directly at [Phone Number] or [Email Address].

Thank you once again for the opportunity to serve you.

Sincerely,

[Your Name]

[Your Title]

[Company Name]