

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Dear [Client Name],

Thank you for taking the time to meet with me recently for your yearly coverage assessment. It was a pleasure reviewing your current policies and discussing your evolving needs to ensure you remain fully protected.

I sincerely appreciate the trust you place in [Company Name]. Our goal is to provide you with peace of mind through comprehensive coverage and personalized service. Following our review, I have updated your file to reflect the adjustments we discussed.

If you have any further questions or if any changes occur in your life before our next scheduled review, please do not hesitate to reach out to me directly at [Phone Number] or [Email Address].

Thank you once again for your continued business and loyalty.

Best regards,

[Your Name]

[Your Title]

[Company Name]