

[Your Name]
[Your Agency Name]
[Your Phone Number]
[Date]

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

Subject: Follow-Up: Our Annual Insurance Strategy Meeting

Dear [Client Name],

Thank you for taking the time to meet with me on [Date] for our annual insurance strategy review. I enjoyed discussing your current coverage and planning for the year ahead.

Based on our conversation, here is a summary of the key points we discussed and the action items we identified:

- **Review of Current Policies:** We confirmed that your existing coverage for [Policy Types, e.g., Auto, Home, Life] remains in good standing.
- **Changes and Updates:** We noted the following changes in your circumstances: [e.g., New vehicle, home renovations, change in marital status].
- **Strategy Adjustments:** Based on these changes, we have decided to [e.g., increase liability limits, add a rider for jewelry, or adjust deductibles].

Action Items:

- [Your Name] will send the updated policy documents for your signature by [Date].
- [Client Name] will provide [Specific Document, e.g., an appraisal or VIN number] by [Date].
- [Additional Task, if applicable].

I have attached a summary of the premium adjustments for your records. Please review these items and let me know if you have any questions or if anything was missed during our session.

Our goal is to ensure your protection evolves alongside your life. Thank you for your continued trust in [Your Agency Name].

Best regards,

[Your Signature]
[Your Typed Name]
[Your Title]