

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Dear [Client Name],

It was a pleasure meeting with you on [Meeting Date] for your annual insurance review. I appreciate the time you took to discuss your current coverage and your goals for the upcoming year.

During our meeting, we reviewed your existing policies, including [List Policy Types, e.g., Life, Auto, Home]. We also identified the following action items and updates:

- [Action Item 1: e.g., Updated beneficiary information]
- [Action Item 2: e.g., Increased coverage limits for home additions]
- [Action Item 3: e.g., Applied new multi-policy discount]

Attached to this letter, you will find [List Attachments: e.g., the revised policy summaries/quotes we discussed]. Please review these documents and let me know if you have any questions or if any further adjustments are needed.

If you are ready to proceed with the changes mentioned above, please [Action: e.g., sign the attached forms and return them by Date].

Thank you for your continued trust in [Company Name]. If you have any questions or if your circumstances change throughout the year, please do not hesitate to contact me at [Phone Number] or [Email Address].

Sincerely,

[Your Name]

[Your Title]

[Company Name]