

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Dear [Client Name],

Thank you for taking the time to meet with us recently for your annual insurance review. We appreciate the opportunity to discuss your current coverage and ensure that your policies continue to meet your needs.

As we discussed, we have updated your records to reflect the following changes:

- [Change/Update 1]
- [Change/Update 2]

Our goal is to provide you with peace of mind knowing that your assets are properly protected. If you have any further questions or if any new life events occur before our next scheduled review, please do not hesitate to contact us at [Phone Number] or [Email Address].

Thank you for choosing [Agency Name] for your insurance needs. We value your business and your trust.

Sincerely,

[Agent Name]

[Agency Name]

[Website Address]