

[Your Name]  
[Your Company Name]  
[Your Address]  
[City, State, Zip Code]  
[Date]

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

Dear [Client Name],

Thank you for taking the time to meet with me on [Date] for our annual renewal and account review consultation. It was a pleasure discussing your progress over the past year and outlining our goals for the upcoming term.

I appreciate your continued trust in [Your Company Name]. Based on our conversation, I have attached a summary of the key points we discussed, including the agreed-upon updates to your [service/policy/plan] and the renewal timeline.

We are committed to supporting your continued success. If you have any further questions or require additional adjustments before the renewal is finalized, please do not hesitate to contact me directly at [Your Phone Number] or [Your Email Address].

We look forward to another successful year of partnership.

Best regards,

[Your Signature]

[Your Printed Name]  
[Your Job Title]