

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Dear [Client Name],

Thank you for taking the time to meet with me on [Date of Meeting] for your annual insurance review. It was a pleasure catching up and ensuring that your coverage continues to meet your current needs.

During our meeting, we discussed several key points, including:

- Review of current policy limits and deductibles.
- Updates regarding [mention specific life changes discussed, e.g., new home, car, or family additions].
- Potential adjustments to [mention specific policy type, e.g., Life or Liability coverage].

As we discussed, I am currently [mention any follow-up actions, e.g., preparing a new quote for your home insurance]. I will send that information to you by [Date].

If you have any further questions or if any other changes occur before our next review, please do not hesitate to contact me at [Phone Number] or [Email Address].

We appreciate your continued trust in [Insurance Agency Name] for your protection needs.

Sincerely,

[Your Name]

[Your Title]

[Insurance Agency Name]