

[Your Name]  
[Your Agency Name]  
[Your Phone Number]  
[Your Email Address]

[Date]

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

Dear [Client Name],

Thank you for taking the time to speak with me on [Date] to discuss your insurance coverage needs. I appreciated the opportunity to learn more about your current situation and your goals for protecting your assets.

As we discussed, I am currently reviewing the details of our conversation to identify the best policies and coverage levels for your specific requirements. My goal is to ensure you have the comprehensive protection you need at the most competitive rate available.

I am working on a formal proposal for you and expect to have it ready by [Date/Time]. Once it is prepared, I will reach out to schedule a brief follow-up to walk you through the options and answer any questions you may have.

In the meantime, if you have any additional thoughts or if any details have changed since our meeting, please do not hesitate to contact me directly.

Thank you again for considering [Your Agency Name] for your insurance needs. I look forward to working with you.

Best regards,

[Your Signature]

[Your Printed Name]