

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Dear [Client Name],

Thank you for taking the time to meet with me on [Date] for your Yearly Insurance Portfolio Assessment. I appreciate the opportunity to review your current coverage and discuss your evolving financial goals.

During our meeting, we reviewed your existing policies and identified the following updates or areas of focus:

- [Key Point 1]
- [Key Point 2]
- [Key Point 3]

Based on our discussion, I am currently processing the following changes: [List any pending actions or "No changes required at this time"].

My goal is to ensure that your protection remains aligned with your lifestyle and provides you with peace of mind. Should you have any questions regarding the summaries we discussed or if any life changes occur before our next review, please do not hesitate to contact me directly at [Phone Number] or [Email Address].

Thank you for your continued trust and for choosing [Company Name] for your insurance needs.

Sincerely,

[Agent Name]

[Title]

[Company Name]