

[Your Name/Company Name]
[Address]
[City, State, Zip Code]
[Phone Number]
[Email Address]

[Date]

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

Subject: A Note of Appreciation and Important Account Review

Dear [Client Name],

We are writing to express our sincere gratitude for the trust you have placed in [Company Name]. It is a privilege to serve as your [Financial Advisor/Insurance Agent/Legal Counsel], and we truly value our ongoing professional relationship.

As part of our commitment to providing you with the best possible service, we periodically recommend reviewing your account details to ensure they still align with your current wishes and life circumstances.

One of the most critical components of your financial security is your designated beneficiary information. Life events such as marriage, divorce, births, or changes in family dynamics can significantly impact how you wish your assets to be distributed. Having outdated beneficiaries can lead to unintended legal complications and delays for your loved ones.

Action Requested:

Please take a moment to review your current beneficiary designations on file. If you would like to make any updates or if you are unsure of your current selections, please contact us at [Phone Number] or [Email Address] to request a Beneficiary Designation Form or to schedule a brief review meeting.

Thank you again for choosing [Company Name]. We look forward to continuing to help you achieve your goals.

Best regards,

[Signature]

[Your Printed Name]
[Your Title]